

TURNING WEALTH ADVISORS INTO “ROCKSTARS” – WELCOME TO D1G1T

Dan Rosen, CEO, **d1g1t**, talks to *WealthBriefing* Editor Tom Burroughes on the firm’s accomplishments.

What sets you apart from your peers this year and why?

d1g1t passionately believes that financial advisors are irreplaceable when it comes to supporting client needs and goals, especially for high net worth and ultra-high net worth individuals and families. This is particularly true in a year like 2022 with uncertainty around inflation and the lingering impacts of the pandemic.

The d1g1t platform was designed from the beginning with the advisor client engagement at the forefront, and to make “rockstars” out of a firm’s advisors. Our purpose is to empower wealth management firms to scale up the high-value, human services that will set them apart in an increasingly digital world. It is this focus as a firm that sets us apart.

How have your colleagues contributed towards the success of your organization?

The other 2 co-founders of d1g1t, Benoit Fleury (CPO) and Philippe Rouanet (COO), are veteran entrepreneurs who have worked together with me for over 20 years, building and growing successful fintech businesses with strong financial engineering, R&D and end-to-end business teams.

Each of us has extensive experience in developing enterprise risk and portfolio management systems which have been used by many of the world’s top financial institutions.

Around this core, we have surrounded ourselves with an outstanding senior management team with an extensive track record in the Financial Services Industry while, at the same time, nurturing what I believe is the strongest financial engineering team in the industry.

What are you going to do to stay on the front foot in a fast-growing but also challenging region such as this?

For d1g1t to stay in the forefront, we need to continue to prioritize the investment we have made in innovation which has been critical to our success to date. The recent advances in goals based

investing and Behavioural Finance in the industry are providing advisors with a broader range of discussion points as they engage with their clients. This approach is often more in line with how clients think about risk and return.

d1g1t is investing in the analytics and AI capabilities that can support and validate these discussions and, importantly, to make these analytics accessible to both advisor and client.

How has your business and business model reacted to the pandemic? Has morale amongst your colleagues held up well during the pandemic?

The pandemic has created challenges of course, but also many opportunities. d1g1t was able to grow at just under 100% for the second consecutive year of the pandemic. Our business model has been able to thrive as the world, and our client base in particular, has embraced more on-line engagement.

From a people perspective, we have grown the d1g1t team by 80 % as well in the past year and greatly strengthen our senior management team. Today, the vast majority of our people joined the company during the last two years

What have you done to bolster their spirits?

I believe that the culture of a firm plays a very important role in fostering morale. The d1g1t culture has always been about innovation and delivering excellence, both in our product and our service to clients. For our people to fully appreciate our culture, we need to constantly engage with them beyond just their direct responsibilities and, importantly, provide them with ample opportunity to participate in the dynamic of the firm. We are still a small enough team that we can schedule firm-wide townhalls, educational seminars, and social events on a regular basis, with everyone contributing to these sessions. We are a hard working, high achieving team, but it is critical to carve out time for fun and humour in order to foster morale in a challenging environment.



Dan Rosen
CEO, d1g1t

Have your differentiators become more important to your business? Are they still relevant?

Right from the beginning, our biggest differentiator was that we developed the first truly enterprise wealth management platform powered by institutional-grade analytics & risk management tools.

Combining these capabilities while constantly placing the advisor client engagement at the forefront of the d1g1t platform is core to our value proposition to clients.

While many observers have predicted that technology will replace financial advisors entirely, we disagree wholeheartedly. Indeed, we believe that the role of the financial advisor will become increasingly critical in 2022 as investors continue to adapt to inflation and pandemic-related uncertainty.

In our mind, therefore, this differentiator has become even more relevant today as we continue to provide the deep (yet accessible) tools to support the success of financial advisors, enabling firms and their advisors to elevate the quality of advice & demonstrate its value to clients. ■

