

Financial Advice and Asset Management in the Quickly Evolving World of Automated Advice and Big Data

John Michel from CircleBlack

Date/Time: 4/24/2019 at 1:00

Location: Leir Conference Room, CAB 3052

Abstract: John Michel, CEO of CircleBlack, will discuss the firm's evolution from its predecessor, Bloomberg Black, to its current business model. The presentation will include the firm's approach to holistic portfolio monitoring, risk management and performance reporting across multiple client accounts as well as specific analytics and capabilities that differentiate CircleBlack from other wealth management platforms. The presentation will look at the evolution of asset management from robo-advisors to hedge funds and family offices leveraging big data and artificial intelligence.

Speaker Bio: John Michel, a distinguished financial professional, is the Chief Executive Officer of CircleBlack. Michel, along with a team of experienced financial innovators, founded the company in 2013 with the goal of delivering modern technology to the financial services industry. His vision was to create a platform that would strengthen the bond between financial advisors and their clients, while also providing substantial revenue-generating opportunities for advisors with its proprietary technology.

Michel previously served as the President of Bloomberg Wealth, a wholly-owned subsidiary of Bloomberg L.P. He led the introduction of BloombergBlack, which had one of the fastest launches in the industry. The business captured over \$1.5 billion in assets in less than six months and proved that investors were willing to pay an incremental \$100 per month for a value-added wealth management service delivered primarily through technology. Throughout his 25 years as both an intrapreneur and entrepreneur, Michel has played an instrumental role in the conceptualization and launch of game-changing financial services products across a diverse array of channels.

CircleBlack believes in making wealth management better, for both the investor and the advisor. Built on cutting-edge technology, CircleBlack provides a usable, simple, secure, powerful platform that gives investors a complete picture of their wealth, curated information that cuts through the noise to enhance financial knowledge, and a reporting engine that helps investors focus on what is truly important, their long term goals, without being distracted by daily market fluctuations. In doing so, CircleBlack facilitates rich conversations and more rewarding relationships between investors and their advisors. The platform is built for the 21st Century in a web-based application format that can be taken anywhere and accessed anytime, on a tablet or smartphone. Visit www.circleblack.com for more information.