



AI is scaling. Regulations are tightening. Budgets? Not so much.

The UK's financial services and insurance firms are in the middle of a high-stakes shift — where data leaders are being asked to deliver clarity, speed, and commercial value all at once.

CDAO Financial Services & Insurance UK 2025 isn't another conference. It's where the ones actually doing the work come to compare notes, swap strategies, and get ahead of what's next.

What sets this one apart:

- ◆ **Split tracks for a reason.**

Retail banking isn't reinsurance. So, we've built two focused agendas — one for FS, one for Insurance — shaped by the people in it, not by guesswork.

- ◆ **Economic pressure, real talk.**

Everyone's being asked to do more with less. We'll look at how sharp teams are cutting costs without cutting corners — and where they're still finding room to grow.

- ◆ **No filler. No sales pitches.**

Interactive roundtables, closed-door peer groups, and sessions that get to the point. Less fluff, more of what you wish someone had told you sooner.

- ◆ **AI that earns its keep.**

We'll separate hype from impact — from agentic AI in operations to GenAI in compliance — and show what real ROI looks like in practice.

- ◆ **The right room.**

Not just networking for the sake of it. You'll be in the room with people facing the same internal battles, stakeholder questions, and strategic trade-offs — and they're ready to talk.

**Get in touch with the Conference Producer for this event via monika.dincheva@coriniumgroup.com*

Confirmed Speakers:

- Vladimir Bendikow, *Chief Data Officer* - **FirstBank UK Limited**
- Peter Jackson, *Interim Global Head of Data Office* – **SCHRODERS**
- Sharada Khanna, *Global Lead for Originations and Credit Bureau Data Strategy, Retail Banking* - **HSBC**
- Alexandra Winward, *Finance Data Executive* – **LLOYDS BANKING GROUP**
- Sally Bashuan, *Executive Director - Head of Global Data Governance*- **Federated Hermes**
- Katerina Papavasileiou, *Director, ESG and Responsibility* - **Federated Hermes**
- Martin Nelson, *Data Platforms Adoption Lead and Product Owner*- **NFU MUTUAL**
- Dr Madhura Shivaraju, *Senior Data and AI Specialist* - **UBS**
- Beatrice Russell, *MDM Global Implementation Leader - Technology* – **AON**
- Vivek Sayal, *Head of Model Strategy and Non-Financial Risk Analytics* – **Virgin Money**
- Ishant Aggarwal, *Document AI Lead* - **Lloyds**
- Lucy Clayton, *CCB Data Analytics Manager* - **Santander UK**
- Sheetal Bakshi, *Data Strategy and Management Lead* - **Capco**
- Alan Strange, *Head of Underwriting & Analytics*- **Sophro MGA Ltd**
- Bhushan Kokate, *Chief Architect: Data, Analytics and AI* – **MS AMLIN**
- Gael Decoud, *Director Data Science* – **CHETWOOD FINANCIAL LIMITED**
- Francesco Di Costanzo, *CEO* – **JAFA FINANCE**
- Rebecca Linehan, *Head of Insight* - **Confused.com**
- Aman Aneja, *Director of Analytics* - **Farview Equity Partners**
- Malcolm Hawker, *Chief Data Officer* – **PROFISEE**
- Alexandre Iorga, *Head of SE* – **SIFFLET**
- Tom Sadler, *Data Science and AI Business Solutions Lead UK & AI and SME* –**HP**
- Andi McBurnie, *Chief Architect* – **GIBBS Consulting**
- Richard Cooke, *UK Business Lead* - **KEEPLER**

9 th September 2025	
CDAO FSI 2025	
08:00 – 08:45	<i>Registration & Coffee in the Exhibition Area</i>
8:45 - 8:55	Chair's Opening Remarks Martin Nelson, <i>Data Platforms Adoption Lead and Product Owner</i> - NFU MUTUAL

8:55-9:00	<p>Speed Networking – Making new connections at CDAO FSI!</p> <p>During this 5-minute networking session, the aim of the game is to go and meet two people you don't already know.</p>
09:00 - 09:30	<p>Panel Discussion: Adapting to Economic Uncertainty in Data & AI</p> <ul style="list-style-type: none"> • How are companies using AI and automation to optimise operations, reduce costs, and drive innovation in challenging economic conditions? • How are data leaders identifying new opportunities and areas for growth despite tightening budgets? • How are organisations using data and predictive analytics to detect potential risks early and manage financial uncertainty? • How are data strategies being adapted to create more resilient and adaptable business models during periods of economic volatility? <p>Moderator: Vivek Sayal, <i>Head of Model Strategy and Non-Financial Risk Analytics</i> – Virgin Money Gael Decoud, <i>Director Data Science</i> – CHETWOOD FINANCIAL LIMITED Alexandra Winward, <i>Finance Data Executive</i> – LLOYDS BANKING GROUP Alan Strange, <i>Head of Underwriting & Analytics</i>- Sophro MGA Ltd</p>
09:30 - 10:00	<p>Presentation: Architecting the future of Business</p> <ul style="list-style-type: none"> • AI Evolution: The presentation highlights the rapid evolution of AI, from early excitement in the 1950s to the current advancements in Generative AI and Agentic AI . • Workforce Impact: AI is expected to replace 85 million jobs while creating 97 million new roles by the end of the decade, with a significant impact on the global economy • AI Agents: AI agents are not just chatbots but digital workers that can autonomously execute tasks, bringing transformative changes to various industries • AI Opportunities: Identifying AI opportunities in manufacturing, prioritizing solutions based on impact, feasibility, and ROI, and leveraging AI for inventory optimization, production scheduling, and predictive maintenance <p>Tom Sadler, Data Science and AI Business Solutions Lead UK & AI and SME -HP</p>
10:00 - 10:30	<p>Presentation: MDM - Your Data Journey Starts Here</p> <p>The choices facing data leaders tasked to transform their data and analytics functions into levers of innovation and change are overwhelming. Mountains of and technical and data debt, excessive market hype, and increasing pressure to show progress on AI are exacerbating the enormity of the task. Overcoming these barriers is key to breaking the curse of excessively short CDO tenures.</p>

	<p>Data leaders who are implementing or revitalizing their data teams, and who seek an answer to the question of <i>‘where should I start?’</i> must:</p> <ol style="list-style-type: none"> 1. Revisit legacy assumptions, challenge the status quo 2. Embrace an operating model focused on agility 3. Prioritize progress over perfection; take a practical approach to GenAI 4. Recognize that ‘all data is not created equally’ 5. Leverage an analytical style of master data management (MDM) to drive short-term value, and establish a strong data foundation <p>Come hear industry expert, author of the ‘Data Hero Playbook’, and the CDO of Profisee, Malcolm Hawker, as he shares valuable insights the practical steps data leaders must take to drive meaningful and lasting changes in their organizations. Malcolm also shares his experience on how an analytical style of MDM is the perfect balance between short-term business value, AI-based innovation, and data foundations.</p> <p>Malcolm Hawker, <i>Chief Data Officer</i> - PROFISEE</p>	
10:30 11:00	Mid-Morning Coffee & Networking in the Exhibition Area	
11:00- 11:30	<p>Presentation: Designing Data Products That Actually Make Money</p> <ul style="list-style-type: none"> • The difference between monetisation hype and productised value • Internal vs external data products: What works, what flops • Pricing, packaging and scaling: A playbook from those doing it • Metrics that prove long-term value (not just quick wins) <p>Peter Jackson, <i>Interim Global Head of Data Office</i> – SCHRODERS</p>	
11:30- 12:45	<p>TRACK A</p> <p>Financial Services</p>	<p>TRACK B</p> <p>Insurance</p>
11:30 – 12:00	<p>Presentation: Scaling Success: Data-Driven Experience, Inclusion, and Lending</p> <ul style="list-style-type: none"> • Committing to elevating customer experience • Harnessing Open Banking to enable financial inclusion • Implementing sophisticated analytics and risk models to 	<p>Workshop: Unlocking Value: Sustainability, Data & Investment in Real Estate</p> <ul style="list-style-type: none"> • The Data Dilemma in Real Estate • Sustainability: Burden or Breakthrough? • AI & the Future of Real Estate Investment • Interactive Discussion & Q&A

	<p>ensure responsible lending practices.</p> <ul style="list-style-type: none"> Unlocking the power of partnerships <p>Francesco Di Costanzo, <i>CEO -JAJA FINANCE</i></p>	<p>The right data at the right time—especially sustainability data—can be the difference between average and exceptional returns. Let’s make sure real estate doesn’t miss the AI-driven transformation.</p> <p>Sally Bashuan, <i>Executive Director - Head of Global Data Governance- Federated Hermes</i></p> <p>Katerina Papavasileiou, <i>Director, ESG and Responsibility - Federated Hermes</i></p>
12:00 - 12:45	<p>Discussion group A:</p> <p>Building Trustworthy AI & Data Governance in a Regulated Environment</p> <ul style="list-style-type: none"> How can senior leaders accelerate AI adoption while staying fully compliant with DORA, NIS2, and the EU AI Act? What frameworks ensure AI models are explainable, auditable, and trusted by regulators and customers? Where should data leaders draw the line between governance discipline and business agility? How can financial institutions turn regulatory pressure into a driver of innovation and value creation? <p>Sheetal Bakshi, <i>Data Strategy and Management Lead – Capco</i></p> <p>Dr Madhura Shivaraju, <i>Senior Data and AI Specialist - UBS</i></p>	<p>Discussion group B:</p> <p>Agentic AI in Action: How Agentic Systems Are Reshaping Claims Management</p> <ul style="list-style-type: none"> Which types of claims or lines of business are proving most viable for agentic AI, and what blockers are you facing? How do you ensure human oversight and regulatory compliance when deploying autonomous agents in claims workflows? What are the toughest tech, people, and culture challenges we face in scaling up the agentic AI usage company-wide, and how do we encourage innovation while keeping risks in check for everyone involved? <p>Richard Cooke, <i>UK Business Lead – KEEPLER</i></p> <p>Bhushan Kokate, <i>Chief Architect: Data, Analytics and AI – MS AMLIN</i></p>
12:45 – 13:45	Lunch & Networking in the Exhibition Area	
13:45-14:15	Panel Discussion: From Black Box to Business Value: Scaling Generative AI Responsibly in Financial Services	

	<ul style="list-style-type: none"> • How are leading firms moving beyond pilots to embed GenAI at scale? • What governance frameworks are essential to mitigate hallucinations, bias, and misuse? • Where is GenAI delivering real impact — from compliance to customer experience? • What are the organisational and cultural shifts required to integrate GenAI into workflows? <p><u>Moderator:</u> Francesco Di Costanzo, <i>CEO</i> – JAJA FINANCE Gael Decoud, <i>Director Data Science</i> – CHETWOOD FINANCIAL LIMITED Sharada Khanna, <i>Global Lead for Originations and Credit Bureau Data Strategy, Retail Banking</i> - HSBC</p>
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14:15-14:45	<p>Presentation: MDM – complex, large scale technology implementation</p> <p>Challenges</p> <ul style="list-style-type: none"> • Fragmented data landscape due to Aon’s history of M&A • Lack of standards, poor data quality, availability, and auditability • Global adoption of centralised master data <p>Lessons Learnt</p> <ul style="list-style-type: none"> • Change management and adoption – articulating the story of why this is important • Balancing decision making between technology acceleration and cross functional alignment <p>Beatrice Russell, <i>MDM Global Implementation Leader - Technology</i> - AON</p>
14:45-15:10	<p>Expert Ask-Me-Anything on AI Ethics, Data Governance & Privacy</p> <p>An informal, interactive session where attendees ask questions directly to an AI ethics and data privacy expert/ experts. The expert will answer questions on the fly, providing practical insights and advice on navigating regulations and building trustworthy AI systems. <u>Focus Areas:</u> AI ethics, data privacy, regulatory challenges.</p> <p>Sally Bashuan, <i>Executive Director - Head of Global Data Governance</i>- Federated Hermes Vladimir Bendikow, <i>Chief Data Officer</i> - FirstBank UK Limited Andi McBurnie, <i>Chief Architect</i> – GIBBS Consulting</p>
15:10 - 15:30	<p><i>Afternoon Break & Networking in the Exhibition Area</i></p>

15:30-16:00	<p>Panel Discussion: Building Resilience: Long-Term Strategies for Thriving Amid Economic Pressures</p> <ul style="list-style-type: none"> • What long-term strategies are successful businesses adopting to ensure resilience during periods of economic turbulence? • How are companies reshaping their approaches to data, governance, and AI to remain adaptable in the face of market volatility? • How can businesses leverage data and AI to future-proof their operations against ongoing economic uncertainties? • What role do governance frameworks play in helping companies navigate financial instability and ensure sustainable growth? <p>Moderator: Alexandre Iorga, <i>Head of SE</i> – SIFFLET Ishant Aggarwal, <i>Document AI Lead</i> – Lloyds Dr Madhura Shivaraju, <i>Senior Data and AI Specialist</i> - UBS</p>
16:00-16:30	<p>Panel Discussion: Are Data Monetisation Strategies the Key to Unlocking Hidden Value?</p> <ul style="list-style-type: none"> • How can organisations leverage data monetisation to unlock new revenue streams and create value from existing assets? • What role does data governance play in ensuring the ethical and secure monetisation of valuable data? • Can data monetisation strategies truly deliver long-term value, or are they just a short-term financial boost? • How can companies identify untapped opportunities for data monetisation without compromising customer trust or privacy? <p>Moderator: Rebecca Linehan, <i>Head of Insight</i> - Confused.com Vivek Sayal, <i>Head of Model Strategy and Non-Financial Risk Analytics</i> – Virgin Money Lucy Clayton, <i>CCB Data Analytics Manager</i> - Santander UK Ishant Aggarwal, <i>Document AI Lead</i> - Lloyds</p>
16:30-17:00	<p>Roundtable: The Data-Ready Org: Culture, Change and Leadership Realities</p> <ul style="list-style-type: none"> • How can data leaders build a truly data-driven culture — not just a tech stack? • What are the biggest people and mindset barriers to data adoption? • How do you win senior buy-in and drive cross-functional accountability? • Where are most firms going wrong with data literacy — and how do you fix it? • What does an effective, modern data team structure actually look like? • How do you sustain momentum through organisational change and fatigue? <p>Alexandra Winward, <i>Finance Data Executive</i> – LLOYDS BANKING GROUP Beatrice Russell, <i>MDM Global Implementation Leader</i> – Technology- AON</p>

17:00- 17:10	Chairs Closing Remarks Martin Nelson, <i>Data Platforms Adoption Lead and Product Owner</i> - NFU MUTUAL
17:10 - 18:30	<i>Networking drinks and Prize Draw</i>
18:30	END OF THE CONFERENCE