

Fuse 2017 Judge Profile: Billy Oliverio



In the months leading up to Fuse 2017, we're profiling the event's panel of judges. This week's profile is Billy Oliverio, Senior Vice President and Chief Marketing Officer at United Planners Financial Services.

Billy Oliverio has spent the last twenty years in the financial services industry. His experience spans from regulation, as the Chief Investigator of Enforcement for the Arizona Securities Division, to coordinating all aspects of white collar crime investigations.

Billy's Background

Billy Oliverio is an honors graduate from Arizona State University, where he received a BS in Criminal Justice. He got his start as a private investigator, focusing primarily on asset recovery for savings and loan scandals. In the 1990's, Billy shifted roles, becoming a regulator and served as the Chief Investigator of Enforcement for the Arizona Corporation Commission, Securities Division.

He loved the regulatory experience for the excitement and the learning that came along with it. He got to oversee white-collar crime investigations, orchestrating all aspects including undercover operations, search warrants, surveillance, witness preparation, testifying in court, as well as working with inter-agency investigations and task forces.

"But it [the role] was very depressing," he said. Just knowing about all the crime that takes place every day in our industry, and seeing first-hand the damage to

the victims, took a toll on him. He would see people of all ages affected, but was especially depressed seeing retirees lose their entire nest egg to investment scams.

After this, Billy broke away from his law enforcement career and transitioned into the world of finance as a compliance officer. He spent most of his early finance career in compliance, working in various levels of management, including Chief Compliance Officer.

After several years in compliance, Billy moved to the business side of the industry, where he now serves as the Senior Vice President and Chief Marketing Officer at United Planners. The firm is celebrating its 30-year anniversary.

In his current role, Billy is responsible for the vision and strategy of the Advisor Services Department. He oversees multiple business units including annuities and insurance, investment advisory, retirement plans, practice management and corporate events.

Looking Back to Last Year's Fuse

This Billy's fourth year as a Fuse judge. Over the last few years, Billy says Fuse has become a fantastic advocate for FinTech innovations, and is especially attentive to the needs of the advisor community.

In his own words, "Fuse is a unique event, dedicated to rounding up the best fintech engineers across the industry and essentially locking them down for a weekend in a highly-stimulated think tank, stocked with every sort of energy drink known to man."

This combination of factors yields change. The innovations enhance the advisor's experience, allowing them to be more efficient and effective in managing their businesses and servicing their clients.

"There are no limits to the creativity that comes out of these Fuse events. They are facilitated in a fashion that truly embraces creativity for the betterment of our industry."

Looking Ahead to September

For Fuse 2017, Billy is looking forward to the usual excitement and adventures. He's excited to reconnect with friends and get their latest perspectives on industry challenges and their insights on how to solve them.

Specific challenges he'd like to see developers address are cybersecurity and fiduciary issues, both he says are topics that have "been juggernauts in our industry." As for cybersecurity, Billy is hoping to see what additional safeguards or standards are being developed to help satisfy concerns over data transmission, specifically with integrations.

"On the DOL front, I'd like to see how fintech providers are augmenting their workflows to better acknowledge fiduciary standards in an efficient manner," Billy said.

Another way to impress Billy? "I'd like to see more mobile app functionality given our culture's love-fest over their mobile devices."

Fuse 2017 is the premier conference for financial services technology developers and programmers. For more information about this year's event, visit fuse2017.com or keep up with us on Twitter using the #FuseUtah hashtag.

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