Personal Finance Society

Standards. Professionalism. Trust.

Agenda

Birmingham Regional Conference 3 2022

Venue:

Eastside Rooms, Woodcock Street, Birmingham , B7 4BL

Date:

Wednesday 14 Sep 2022

CPD
CII Scheme
4:15

Personal Finance Society
Standards. Professionalism. Trust.

Birmingham Regional Conference 3 2022

In association with our Partners in Professionalism:

7IM Ninety One L&G

14-Sep-2022

08:45 - 09:30 **Registration**

09:30 - 09:40 **Chair Introduction**

09:40 - 10:25 **Seeking greater certainty in an uncertain world**

Learning Objectives:

- What defines a Quality company
- Understand difference between Quality and Growth
- Understand how Quality performs in different market environments
- Understand the importance of a Quality company's ability to self-fund its future growth in an era of persistent Inflation and rising Interest Rates
- How Quality can be used within a portfolio to create stability and a core steady growth engine – on both a global and geographic basis

Sophie Harris, Ninety One

10:25 - 11:15 **Putting protection into wealth**

- Identify opportunities to introduce and review protection needs at different life stages with clients
- Consider how to use a cashflow model to best engage your clients to demonstrate how protection could lead to better client out comes
- Demonstrate how these ideas can be effective at every stage of the lifetime of advice from the accumulation of wealth through to decumulation stage

Robert Betts, Legal & General

11:15 - 11:20 **Professional Qualifications Officer**

11:20 - 11:40 **Coffee Break**

11:40 - 11:45 **Chartered Champion**

11:45 - 12:30 **Let’s get it together**

- To review the ‘in & at retirement’ landscape to understand what has changed since 2019
- Review key themes identified in research and how the wider industry is approaching clients in this life stage
- Explore what solutions might be suitable in the current climate
- Understand key ways to help ‘future proof’ a retirement proposition to meet changing regulatory and investment conditions

Arnie Millington, 7IM

12:30 - 13:05 **Your regional committee led session**

Learning objectives:
Ben Wright, Change Squared Limited

13:05 - 13:10 **Education Outreach Ambassador**

13:10 - 13:55 **LUNCH**

13:55 - 14:00 **Membership Officer**

14:00 - 14:35 **Using the Professional Map to drive good client outcomes**

The session will cover:

1. What the Professional Map is and how it's being used to underpin learning and CPD
2. How competencies can be used to drive good client outcomes
3. How you can use the Professional Map, no matter the size of your firm

Hayley Brown,

14:35 - 15:20 **Pricing Your Service**

Learning Objectives

- Explore a framework for assessing price and fair value
- Use adviser benchmarking and client survey data from Dimensional's global studies to test for fair value
- Discuss how firms can communicate the value of their advice
- Understand where how the price of financial advice fits within contributes to the total cost of the value proposition

Lester Curley , Dimensional Fund Advisors

15:20 - 15:25 **Chair's close**

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The content in each session has been carefully selected and can be considered for both structured and unstructured CPD hours, depending how this activity addressed each individual's personal development needs.

Structured CPD is the undertaking of any formal learning activity designed to meet a specific learning outcome (this is what an individual is expected to know, understand or do as a result of his or her learning).

Unstructured CPD is any activity an individual considers has met a learning outcome, but which may not have been specifically designed to meet their development needs.

Attendance at this event can be included as part of your CPD requirements should you consider it relevant to your professional development needs.