Agenda

Birmingham Regional Conference
Q2 2016

Venue:
Ramada Sutton Coldfield, Penns Lake Rd,
Sutton Coldfield, Birmingham, B76 1LH

Date:
Wednesday 20 Apr 2016

CPD
CII Scheme
4 hrs
### 30-Nov--0001

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<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Speaker</th>
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<tr>
<td>08:30 - 09:00</td>
<td>Delegate Registration</td>
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<td>09:00 - 09:15</td>
<td>Welcome and Introduction from the Chairman</td>
<td>Dominic Brentnall, Barclays Wealth</td>
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<td>Is LISA nicer?</td>
<td>Fiona Tait, Intelligent Pensions Ltd</td>
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**Is LISA nicer?**

Learning objectives, to be able to;

- Fully understand the high level changes to pension tax relief
- Have a good insight into the technical detail of the changes and how they will affect their clients
- Create a plan of action to contact those clients who will be the first to be affected, and those who are likely to experience the greatest impact
Strategic and Operational Planning - Video 1 – The 5 Key elements of a Strategic Plan

An outline of the key components of an effective strategic plan with an explanation of each component, why each is important and the key questions that need to be considered. This will include:

- Why the business exists and how it makes the lives of the people it serves better
- Developing a clear and compelling 3 year vision for the business
- Establishing specific strategic goals (the numbers behind the vision)
- Identifying the critical success factors
- Agreeing 3-5 strategic priorities (the big rocks)

Steve Billingham, Steve Billingham Consulting

Who wants to be a fund manager?

Learning Objectives

- Understand the importance of an active approach to investing
- Gain insight into Columbia Threadneedle’s views on current themes across key asset classes
- Explore the range of support materials and tools available to advisers via Columbia Threadneedle’s Adviser Centre

Steve Armitage, Threadneedle Asset Management

Education Officer

Tea / Coffee Break
Enhancing the Value of Advice through Practical Behavioural Finance Tips

Learning objectives

- Refresh and apply your knowledge of behavioural finance theory
- Demonstrate the value of your advice in every client interaction
- Improve your client relationship management and client satisfaction.

Phil Robotham, Schroders

Video 2 – Translating the strategy into an operational plan

Having established an agreed strategic vision, advisers then need to translate that into clear operational goals that will move them towards it. This video will look at how to do that and will include

- Setting operational goals which look beyond just the financials
- Agreeing the key measures that will be used to track progress (KPIs)
- Establishing a Management Information Dashboard
- Input Measures
- Output Measures

Steve Billingham, Steve Billingham Consulting
## Business Protection

**Learning objectives:**

- Identify the risk areas that business protection products protect.
- Understand the demographics of UK small businesses and how business protection fits into their context.
- Understand business owner’s attitude to risk within the context of business protection.
- Recognise the need for Key Person, Shareholder, Loan & Relevant Life Protection.

Robert Betts, Legal & General

## Membership Officer

### 12:40 - 12:45

**Membership Officer**

## Lunch

### 12:45 - 13:25

**Lunch**

## 2016 Budget Implications and Opportunities

**Learning Objectives:**

- To understand the important proposals in the Budget that will affect clients of financial advisers.
- To understand the latest position with tax provisions on pensions and investments that start from 6 April 2016 and were announced last year.
- To discover the tax and financial planning opportunities for clients based on the new proposals and the provisions due to become effective from 6 April 2016 and 6 April 2017.

John Woolley, John Woolley,
14:25 - 14:35  
Tea / Coffee collection

14:35 - 14:45  
**Video 3 – Executing the Plan**

Having a written plan is one thing. Executing that plan effectively is entirely another. We see so many businesses struggle, not because they don’t have a plan, but because they have failed to implement it effectively. This video will provide a clear methodology for implementing the plan, tracking progress and holding everyone accountable for executing the plan. It will cover:

- The 4 essential disciplines to effective execution
- Establishing a cycle of regular reviews
- How to keep people accountable for progress
- Agreeing deadlines and recording key decisions

Steve Billingham, Steve Billingham Consulting

14:45 - 15:25  
**Reviewing DB pension schemes**

Learning objectives:

- To provide an overview of the factors to be considered when reviewing a legacy DB pension scheme, to reduce risk
- To provide an overview of liability management exercises from a regulatory and practical perspective
- To provide ideas as to how you can help your client carry out a review of their DB arrangement and explore alternative solutions

Jonathan Jackaman, The Pensions Trust, Verity House
15:25 - 15:30

Chairman closing remarks
Dominic Brentnall, Barclays Wealth
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.