Agenda
Bristol and Cheltenham Regional Conference Q4 2019

Venue:
Cheltenham Racecourse, Cheltenham Racecourse, Cheltenham, GL50 4SH

Date:
Wednesday 13 Nov 2019
In association with our Partners in Professionalism:

Delegate Registration

Chair’s welcome and AGM
Hazel Richards, Hazel Richards Consultancy Ltd

Pulling all the levers – from the normal to the niche

- Recognise key risk indicators, and the ways in which they can be interpreted
- Learn the different ways to dynamically manage risk
- Understand the benefits of a flexible approach to portfolio risk positioning

Chris Warren, Cornelian Asset Managers
10:15 - 10:50  Understanding – Making complex things simple, not the other way around

By the end of this session you will understand:

- The regulatory requirements for client understanding
- The techniques and tools available to aid understanding
- The behaviour psychological theories that apply
- The limitations of unit price returns and measurements

Chris Jones, Dynamic Planner

10:50 - 10:55  Membership Officer
Stuart Hutton, Raymond James Investment Services

10:55 - 11:20  Morning break

11:20 - 11:25  Chartered Champion
11:25 - 12:00  Retirement Income – Past, Present and Future

By attending this session, advisers will be able to:

- Discuss the fundamental shift in risks relating to the retirement market
- Understand the key elements relating to guaranteed income as published in PS19/01
- Recognise the importance of accurate underwriting information
- Discuss how to achieve the balance between flexibility and a guaranteed income for life

Jeremy Martin, Just

12:00 - 12:35  Allowance…what allowance?

- An overview of the various annual allowances – how and when they are triggered
- How these annual allowances work alongside each other
- How to calculate any charge that may apply

Andrew Nash, Prudential

12:35 - 13:10  How to introduce mobile communications into your advice process

This session will help you to;

- Understand how clients are engaging with digital technology
- The problems you can solve for them to ensure great adoption
- The operational efficiencies this delivers

Sim Sangha, moneyinfo limited
13:10 - 13:15  Professional Qualifications Officer

13:15 - 13:55  Lunch

13:55 - 14:30  How technology is giving advisers, time, efficiency and growing revenues

- Appreciate the results that technology is helping advice firms to realise
- Recognise how advice firms are using the technology available in the market to drive efficiency through their advice processes
- Identify what technology can deliver in your business

Martin Hall, Intelliflo

14:30 - 15:05  Protection Session

Andy Woollon, Zurich

15:05 - 15:15  Coffee grab

15:15 - 16:15  Retirement Case Study

In this interactive session, we will be covering the following:

- Building rapport with new clients
• Getting beyond the factfind – clarifying the clients’ aims and objectives and identifying issues to consider when advising them
• A cunning plan – putting in place a decumulation strategy that achieves their objectives

Neil Dickey, Professional Edge Ltd

16:15 - 16:25  Chair’s Close
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.