



Personal  
Finance  
Society

Standards. Professionalism. Trust.

## Agenda

### Exeter and North Devon Autumn Conference

#### Venue:

Sandy Park Conference & Banqueting Centre, Sandy Park Way, Exeter ,  
EX2 7NN

#### Date:

Wednesday 04 Oct 2023



## Exeter and North Devon Autumn Conference

In association with our Partners in Professionalism:



4-Oct-2023

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

**09:30 - 09:35 Chair Introduction**

**09:35 - 09:50 Word Cloud Activity**

1. Discuss topical issues with professional peers
2. Learn from hearing and sharing experiences with the wider group

**09:50 - 10:25 Lost in the woods; Cabin fever or follow the breadcrumbs?**

**Learning objectives:**

- Explain the recent macro events that reshaped the markets and caused disruption for investors.
- Describe how investors have been positioned in the past and the regions they should look to allocate to, going forward.
- Recognise the impact of future trends on our industry.

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**Elliot Date, Fidelity International**

**10:25 - 11:00 Future-proofing your client's legacy – IHT planning with protection**

**Learning objectives:**

- Be aware of the current IHT market conditions and how protection fits into the IHT planning process
- Understand the protection product choices available, how they work and how to demonstrate the value to the client
- Be aware of the value of using a trust and children's critical illness cover can be added to protect younger families
- Know where and how to access Zurich support for advisers operating in the estate planning or protection markets

Andy Woollon, Zurich Insurance Company Ltd

**11:00 - 11:05 Professional Qualifications Officer**

**11:05 - 11:25 Conversations Over Coffee**

**11:25 - 11:30 Chartered Champion**

**11:30 - 12:05 "All change please, all change". Why many current financial planning strategies regarding tax have reached the end of the line.**

**Learning objectives:**

- Understand the fiscal changes over the last 12 months and it's impact on the tax rules
- Be able to describe the implications on financial planning and provide examples
- Be able to critically assess why this and consumer duty require different approaches than before.

Phil Griffin, Quilter Business Services Limited

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**12:05 - 12:40 Retirement Income – time for a new approach?**

**Learning Objectives:**

- Understand the impact of the economic environment on retirement income portfolios
- Discuss the impact of markets on financial resilience and sustainability
- Recognise the market developments in guaranteed income

Karl Steadman, Just.

**12:40 - 12:45 Education Outreach Ambassador**

**12:45 - 13:25 Lunch and Learn**

**13:25 - 13:40 Word Cloud Activity**

**13:40 - 13:45 Membership Officer**

**13:45 - 14:20 “The Insiders’ guide to the Value of Advice” – how to help your clients appreciate the benefits of your offering. (Fear not, this is not ANOTHER Consumer Duty presentation..)**

**In this session you will learn:**

- Insights from 200+ of your peers
- What advisers generally view to be most important
- What many advisers are not focusing on
- Useful statistics that precisely quantify the value of financial advice
- A comprehensive list of adviser skills & attributes

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- A roadmap to help you assess and convey your value to clients
  - 3 case studies to show the different ways this can be done
  - What clients think. There is often a sizeable mismatch between what advisers believe adds value versus what their clients perceive to be valuable

Dean Swindell, PortfolioMetrix

## 14:20 - 15:20      **Consumer Duty – Our expectations of firms**

- Understand the background to and key elements of the Consumer Duty
- Identify the areas firms need to consider to ensure they are meeting the new requirements
- Understand our supervisory approach when it comes to implementation of the Consumer Duty

Mark Goold, Financial Conduct Authority

## 15:20 - 15:25      **Chairs 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.

