

Personal  
Finance  
Society  
Standards. Professionalism. Trust

# Agenda

Isle of Man Regional Conference Q1  
2019

**Venue:**

Sefton Hotel, Harris Promenade - Douglas, Douglas , IM1 2RW

**Date:**

Thursday 14 Mar 2019





In association with our Partners in Professionalism:



14-Mar-2019

08:45 - 09:30

**Delegate Registration**

09:30 - 09:40

**Chair's Introduction**

John Walker, Edgewater Associates Ltd

09:40 - 10:15

**The end of the cycle?**

- Understand the outlook for global growth and inflation in 2019 and beyond.
- Outline the key fundamental factors likely to impact asset class performance.
- Understand where Invesco's investment experts believe the best opportunities lie in fixed income and UK equity markets.

Neil Dobson, Invesco



10:15 - 10:50

### **Damned Lies and Statistics – What lies beneath**

- Explain the principles behind the calculation of economic data.
- Understand some of the better and lesser well-known indicators.
- Discuss some of the advantages and disadvantages of relying on some of the better-known indicators.

Chris Johns, Jupiter Asset Management

10:50 - 10:55

### **Professional Qualifications Officer**

Natalie-Jayne Bush, Thornton Chartered FP

10:55 - 11:20

### **Morning Break**

11:20 - 11:25

### **Chartered Champion**

John Hockney, Hockney Stevens Chartered Financial

11:25 - 12:00

### **The UK in 2029**

- Challenge the commonly held negative view of UK equities
- Provide an insight into the key investment themes to watch in the UK over the coming years
- Understand the likely evolution of different industry sectors and how this could create opportunities for active stock pickers

James Bird, Fidelity International



**12:00 - 12:35**

### **Making A Difference – Can you prove it?**

- An understanding of the potential challenges facing advisers, in relation to their fees.
- An understanding of the psychology of advisers and clients, in relation to potential threats.
- A process to help to demonstrate the real value of the on-going advice fee.
- An understanding and demonstration of some online tools that can be used to demonstrate and quantify the importance to clients of receiving professional financial advice.

Nick French, EDVOA

**12:35 - 13:10**

### **A gentle PROD in the right direction... (Product Governance: MIFID II)**

- To understand the principles behind the PROD regulations
- To understand the key requirements that PROD places on adviser businesses
- An ability to articulate a target market and distribution strategy
- An ability to demonstrate governance and oversight

John Lester, Square Mile

**13:10 - 13:50**

### **Lunch**

**13:50 - 13:55**

### **Membership Officer**

Laura Critchley, Hockney Stevens Investment Services



**13:55 - 14:30**

## **Using behavioural science in your practice - helping your clients focus on the long term**

- Why it is important for your clients to think and act long term.
- The behavioural challenges to long term investment.
- How you can help clients focus on the long term.
- The benefits to your client and you.

Dan Kemp, Morningstar

**14:30 - 15:10**

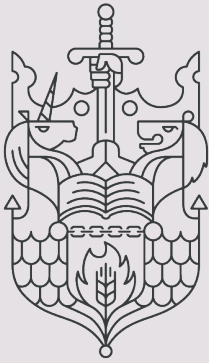
## **Science of retirement**

- Summarise the pros and cons of main flexible withdrawal strategies.
- Understand the impact of fees, asset allocation and market valuation metric.
- Understand adjusting withdrawal rates for longevity.
- Discuss the aged-banded approach to retirement withdrawal.
- Know how to craft a personalised Withdrawal Policy Statement.

Kumar Patel, Timelineapp Tech Limited

**15:10 - 15:20**

## **Chair's Close**



Personal  
Finance  
Society  
Standards. Professionalism. Trust



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.

