Agenda
Keystone Conference 2019

Venue:
The National Conference Centre, Coventry Rd, Hampton in Arden, Solihull, Birmingham, B92 0EJ

Date:
Wednesday 11 Sep 2019
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tr>
<td>09:00 - 09:30</td>
<td>Delegate Registration</td>
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<td>09:30 - 09:45</td>
<td>Chair Introduction</td>
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<td>Tony Gordon, Past MDRT President</td>
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<td>09:45 - 10:00</td>
<td>The value of MDRT</td>
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<td>Ian Green, Green Financial</td>
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<td>10:00 - 10:40</td>
<td>Prospect, Market, Attract!</td>
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<td>• Connecting with clients and prospects on an emotional level.</td>
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<td>• Fee compression. Fact or myth?</td>
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<td>• Building a practice that is “built to last”.</td>
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<td>Andy Lord, Essential Planning (Boston USA)</td>
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<td>10:40 - 11:20</td>
<td>Take your business to the next level with technology</td>
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• Identify systems and applications to use within your business that will help improve efficiency.
• Have an understanding of how to implement apps and websites for social media and networking.
• Understand cashflow forecasting and how to use it with clients as well as how it interacts with other applications such as timeline.

Sarah Hogan, KBA FS Ltd

11:20 - 11:45  Morning Break

11:45 - 12:30  Stop chasing the money (to break through the £1 Million revenue barrier)!

• To discover how the best Financial Planners create a business which is both a joy to work with and a joy to work within.
• To understand why successful Advisory firms see the organisation of clients’ money as a mere “hygiene factor”
• To clarify what skills and capacities create deeper client engagement and magnifies your firm’s reputation
• To explain what “Value” really means to a client.

David Scarlett, The Soul Millionaire Ltd

12:30 - 13:10  Lessons from the 10,000

• To understand how regulation is developing around the world and how this will lead to changes in the UK’s regulation
• To gain a better understanding of our competitors
• To improve internal process to increase productivity in Adviser practices.

David Batchelor, Wills & Trusts

13:10 - 14:00  Lunch

14:00 - 14:40  35 ideas in 40 minutes
To develop new communication strategies with clients
To understand ‘best practice’ from around the world
To obtain a better understanding of how to build value in the clients’ eyes.

Alison Parker, Wills & Trusts IFP Ltd

14:40 - 15:20  Getting ‘yes’ decisions from our clients more easily using these exact 12 words

- What words to use to build rapport and trust in the first 15 seconds.
- How human minds actually makes the final decisions.
- How to talk directly to the decision-making part of the brain, using scientific brain research.
- How to get “Yes decision” using these exact 12 Magic words in a comfortable manner

Bernie De Souza, Executive Business Coach

15:20 - 16:00  Marketing yourself as the expert

- How to create a more powerful marketing message
- How to become the expert in the eyes of your ideal clients
- How to get yourself into the spotlight so you’re seen

Charles Reading, Efficient Portfolio Wealth Management

16:00 - 16:05  Chair 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.