



Personal
Finance
Society
Standards. Professionalism. Trust

Agenda

London National Financial Planning Symposium 2018

Venue:

Intercontinental the O2, 1 Waterview Drive, Greenwich Peninsula ,
SE10 0TW

Date:

22-23 Nov 2018





In association with our Partners in Professionalism:



22-Nov-2018

11:00 - 12:00

Registration and exhibition opens



12:00 - 12:20 **Welcome to the 2018 Financial Planning Symposiums**

Sarah Cruddas, Space for Humanity

12:20 - 12:45 **The Professional Force Awakens- A New Hope**

Keith Richards, Personal Finance Society

12:45 - 13:15 **Difficult to see, the future is**

- Gaining deeper insight into how human beings make choices and how they depict humans making choices
- Gaining a better understanding of the role of time, uncertainty and location in the stories we tell about decision-making
- Analysing examples of story-telling, its impact on people and how we might knowingly and unknowingly use this impact of story-telling in advising and guiding people who are making choices
- Increase the awareness of attitudes to loss, risk, sickness and health and how stories talk about how they influence our choices

Frank Witte, University College London

13:15 - 13:45 **How can you help clients make sense of an uncertain future?**

- Understand why planning is important but plans are not
- Recognise why it's important to consider multiple scenarios
- Using scenarios to explore a client's capacity for risk without getting mired in the detail.

Jason Whyte, EY

13:45 - 15:00 **Lunch and exhibition**

15:00 - 15:30 **Investing for clients in challenging times**



- By the end of the session gain a better understanding of how to navigate the increasingly difficult search for income for clients
- By the end of the session understand why total return should be a consideration within a client portfolio
- By the end of the session understand why prevailing low interest rates have meant that investors, where appropriate to their circumstances, have had to take more risk

John Redwood, Charles Stanley

15:30 - 16:00 Do, or Do Not. There is no try.

- Understand the powerful market forces driving change
- Discover how other businesses have responded to disruption in their industry
- Consider a range of business models to help you continue to meet your clients changing needs

Brett Davidson, FP Advance Ltd

16:00 - 16:40 The power of invisible wealth

- Many future clients will have significant 'invisible wealth' generated from past DB pension scheme membership
- It is and has always been invisible to many of them and those around them
- Advisers will be unable to give holistic financial advice to many clients without taking account of such accrued wealth

Steve Bee, Jargonfree Benefits

16:40 - 17:10 The outlook for the UK economy beyond Brexit

Gain an understanding of those challenges ranging from:

- low productivity
- an ageing population



- high levels of public and private sector debt
- demographics that is changing the world, and its economic and social and political relationships
- threats to globalisation
- the 4th industrial revolution and all it implies as the pace of economic change speeds up, across a range of industries

Trevor Williams, TW Consultancy

17:10 - 17:25 Wrap up and close

Sarah Cruddas, Space for Humanity

23-Nov-2018

08:00 - 08:40 Fidelity Breakfast Session- separate registration required

NOTE: Separate registration is required. Please go to events.thepfs.org to register

08:00 - 09:30 Registration and exhibition opens

08:00 - 08:40 AVIVA Breakfast Session- separate registration required

NOTE: Separate registration is required. Please go to events.thepfs.org to register

09:30 - 09:40 Welcome to the 2018 Financial Planning Symposiums

Justin Urquhart Stewart, Seven Investment Management

09:40 - 10:10 The investment adviser's highest value proposition



- The session will explore the key threats to traditional advice model from technology and commoditization of investment management
- Drawing on behavioural science, we'll explore the key aspects of the financial planning most likely to survive commoditisation

Abraham Okusanya, FinalytiQ Limited

10:10 - 10:40 Supercharge your client journey and take it from woe to woww!

- Discovering what WOWW! means for you and your clients as we enter the new world of The WOWW! Economy™
- Finding a **NEW** but proven process for taking a deeper dive into knowing your client
- Why it is no longer about a client's "Why?" but all about how they experience the most amazing journey of their life
- A new-found appreciation for why collaboration could be the missing ingredient in your business (and, yes, this means all of you!)
- Why documented procedures are no longer just a "nice to have" but are a critical **MUST HAVE** as we enter The New World of Financial Planning™
- An understanding of why continual improvement should rise to the top of your agenda!

Michelle Hoskin, Standards International

10:40 - 11:10 The force of technology and how it's shaping the future of advice delivery

- Does digital signal the end of advice as we know it?
- Learn how advisers are using technology to service their clients in new and innovative ways - while at the same time reducing risk
- Why building a tech savvy business matters in intergenerational financial planning

Abbie Knight, DISCUS

11:10 - 11:40



Coffee break and exhibition

11:40 - 12:10 **The new way to succession**

- Technical details of the Employee Ownership Trust, of interest to owners and employees of IFA businesses as well as their clients
- What changes to make to the infrastructure of a business to make it more sustainable
- How to engage employees in order to increase the strength and profitability of a business

Christopher Budd, Ovation Finance Ltd

12:10 - 12:40 **Your client needs and Cyber Advice - Science Fact or Fiction**

- What current and future clients are saying they want and need from the advice profession
- Identifying the forces at play to enable suitable advice and streamlined service propositions
- Meeting The FCA benchmarks for conduct, risk and professional practice

Chris Davies, Model Office and Engage Insight

12:40 - 13:40 **Lunch and exhibition**

13:40 - 14:10 **Say Hello, Wave Goodbye**

- Understand the impact of PROD and the Investment Platforms Market Study on replacement business
- Consider the impact of these on the construction of adviser propositions, with particular reference to Centralised Investment Propositions
- Investigate the barriers to change and consider which are relevant and which are perceived

Mark Polson, The Lang Cat



14:10 - 14:40 **Now, witness the power of this fully operational cash-flow plan**

- Understand FCA expectations in relation to cash-flow planning
- Consider examples of good and poor practice
- Review your approach

Rory Percival, Rory Percival Training and Consultancy

14:40 - 15:25 **Out of this world**

- The importance of international collaboration and connectivity
- Communication and teamwork
- The fragility of the Earth
- Training to be an astronaut and what weightlessness feels like
- What it feels like to live and work in Space in zero gravity

Helen Sharman, The First British Astronaut

15:25 - 15:35 **Summary and Symposium Close**

Justin Urquhart Stewart, Seven Investment Management



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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.

