Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda
North Scotland Spring Conference

Venue:

Aberdeen Altens, Souter Head Road, Aberdeen , AB12 3LF

Date:

Tuesday 28 Mar 2023

CPD
CII Scheme
3:35

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North Scotland Spring Conference

In association with our Partners in Professionalism:

28-Mar-2023

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

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

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

Discuss a number of key priorities and processes advisers are implementing for consumer duty.

09:50 - 10:25 **The psychology of persuasion; how to increase your influencing skills**

- Explain the core principles of persuasion and how they are used.
- Identify key situations where you can apply the influencing principles to your advisory business.
- Understand why attempts to influence sometimes fail and what to do about it.

Graham Finlay, Columbia Threadneedle Investments

10:25 - 11:10 **What Consumer Duty means for research & due diligence**

To understand:

- Why research & due diligence is important
- FCA rules & expectations & FOS view
- What to do – key activities & actions
- How to approach it – and evidence your process

Chris Jones, DD Hub

11:10 - 11:15 **Professional Qualifications Officer**

11:15 - 11:35 **Conversation Over Coffee**

11:35 - 11:40 **Chartered Champion**

11:40 - 12:15 **Financial planning essentials for small businesses**

By the end of the session you will be able to:

- Explain the key tax implications for small business owners
- Evaluate the planning and advice considerations when advising business owners
- Demonstrate the impact of profit extraction on individuals

Kirsty Anderson, M&G Plc

12:15 - 12:50 What's affecting businesses today for tomorrow

- Explore the future of work and the changing face of group risk and employee benefits
- Identify the driving factors behind the "Great Resignation" and the key risks for businesses in 2023 that need addressing
- Discover how redefining the insurance model to move from protection to prevention and introducing gamification can drive employee engagement

Jo Pawson, YuLife

12:50 - 12:55 Education Outreach Ambassador

12:55 - 13:35 Lunch & Learn

13:35 - 13:50 Word Cloud Activity

Learn about developments in technology to aid the financial planning process.

13:50 - 13:55 Membership Officer

13:55 - 14:30 Investment planning in the new tax environment

- Understand the tax changes that will take effect on 6 April 2023
- Learn the impact these tax rules will have on different investor classes
- Hear an overview of tax efficient investment opportunities

Mr Alan G Whittle, Unburdened Limited

14:30 - 14:35 **Chair 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.