



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Society of Mortgage Professionals Breakfast 2022 - Bristol & Cheltenham

Venue:

Ashton Gate Stadium - Conference Centre, Ashton Road, Bristol , BS3 2EJ

Date:

Wednesday 05 Oct 2022



Society of Mortgage Professionals Breakfast 2022 - Bristol & Cheltenham

In association with our Partners in Professionalism:

5-Oct-2022

08:00 - 08:30 Delegate Registration

08:30 - 08:35 Chair's Welcome and Introduction

Laura Gauden, Chartered Insurance Institute

08:35 - 09:00 Vulnerability and the cost-of-living crisis: The impact on later life lending

Learning objectives

Nick Birdseye, Legal & General Home Finance

09:00 - 09:20 Mortgage Market Update - Coventry for Intermediaries

Coventry's presentation will review how the property market and mortgage industry have performed in recent years. They will also touch on the challenges customers face regarding the cost of living and affordability, and present market insight to help advisors identify opportunities to develop their business.

Coventry will also share some thoughts on the differentiators that could help promote the value of advice and the intermediaries important role in ensuring customers get access to holistic advice and the best possible outcomes.

The presentation will also give an update on the proposed EPC changes for Landlords and how advisors and lenders will play a key role in supporting the Buy to Let market.

Coventry for intermediaries is dedicated to providing brokers with award-winning service and products that give them the confidence to do business with us. Every broker has two Business Development Managers – one in the field and one on the phone. As well as calling us they can now use CFI chat, where our advisors are on hand to help quickly with product and policy information. We also respect that a broker's clients are their clients. At maturity, we'll direct them back to the broker.

Learning Outcomes

- Understand current mortgage market trends and be able to identify further opportunities to support customers and develop your business.
- Gain ideas for providing and supporting access to holistic advice.
- Understand proposed EPC changes in Buy to Let and the challenges faced in improving energy efficiency in homes.

Ben Williams, Coventry Building Society

09:20 - 09:40 Consumer Duty: an FCA overview

Join us to hear from Gordon about an overview of consumer duty and what this means for advisers, firms and their customers. This session will also cover an update on key topics relevant to the sector.

Gordon Findlay, Financial Conduct Authority

09:40 - 10:00 The Mortgage Market – a panel discussion

This session will be an opportunity to hear from all of our speakers, in a topical panel discussion. It will be an interactive session, allowing delegates to have their questions answered by our expert speakers.

Speakers

Laura Gauden

Ben Williams

Gordon Findlay

Nick Birdseye

10:00 - 10:05 Chair's 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.

