



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Surrey Summer Conference

Venue:

Hilton Cobham, Seven Hills Road, Cobham , KT11 1EW

Date:

Wednesday 07 Jun 2023



Surrey Summer Conference

In association with our Partners in Professionalism:



7-Jun-2023

08:45 - 09:30 Registration

09:30 - 09:35 Chair Introduction

09:35 - 09:50 Word Cloud Activity

09:50 - 10:25 Is your CIP fit for duty?

Learning outcomes

- To reinforce understanding and awareness of consumer duty with a focus on investment management.
- To examine whether investment decisions previously made are still fit for new investors.
- To learn more about closed ended funds and how they can be incorporated with a model portfolio.

Our active range of model portfolios offers something different to the traditional basket of collective and so with the advent of consumer duty and the focus around propositions, pricing, value for money our content is both timely and interesting from a learning perspective.

Andrew Tompson, Evelyn Partners

10:25 - 11:00 Property wealth in later life planning?

Learning objectives:

1. To learn more about the lifetime mortgages market, and why clients chose to release equity from their home
2. To find out more about how they could potentially benefit your clients
3. To learn how consumer duty is impacting the later life lending market?

Sanjay Gadhia, Standard Life Home Finance

11:00 - 11:05 Professional Qualifications Officer

11:05 - 11:25 Conversations Over Coffee

11:25 - 11:30 Chartered Champion

11:30 - 12:05 Topical tax planning for blended families

- To look at the opportunities for post-death inheritance tax planning
- To consider the general financial planning issues for people in second marriages with children from a first marriage
- To look at specific planning issues for such people in relation to investments, houses and pensions, and

- To consider the current landscape for lifetime inheritance tax planning that secures the financial position of a surviving spouse/partner

Nick Edwards, Consultniks Limited & Trustee Suppo

12:05 - 12:40 Is your planning toolkit #readyforRishi #readyforSirKier #readyforSirEd

Learning objectives:

- Understand the main budget changes and potential impact on your clients.
- Identify advice opportunities for clients effected by legislation and budget changes.
- Articulate solutions that can be used with clients these clients and the tangible impact these can have.
- Understand how you can satisfy your Consumer Duty obligations through tax planning conversation.

Matt Johnson, Octopus

12:40 - 12:45 Education Outreach Ambassador

12:45 - 13:25 Lunch and Learn

13:25 - 13:40 Word Cloud Activity

13:40 - 13:45 Membership Officer

13:45 - 14:20 The 10 Factors That Can Make or Break Your Valuation

Learning objectives



- **Understand the key factors that contribute to the valuation of your financial advice firm:** Attendees will gain a comprehensive understanding of the various factors that impact the value of their business, enabling them to make informed decisions and take appropriate actions to enhance their firm's valuation.
- **Learn strategies to maximise business value before exiting:** Attendees will learn practical strategies and best practices to increase the value of their financial advice business before considering an exit. This includes optimising financial performance, strengthening client relationships, and developing a scalable and sustainable business model.
- **Identify potential pitfalls that can negatively impact valuation:** By exploring common pitfalls and challenges faced by financial advice businesses during the valuation process, you will be equipped to identify and address potential issues that could negatively impact their business's value. They will gain insights into areas such as regulatory compliance, client retention, and operational efficiency.
- **Gain knowledge on valuation methodologies and approaches:** This session will provide participants with an overview of the various methodologies and approaches used to determine the value of a financial advice business. By understanding these valuation techniques, attendees will be better prepared to navigate the valuation process, negotiate effectively, and assess the credibility of valuation reports.
- **Develop an actionable plan for a successful exit or acquisition:** Participants will leave the session with a clear roadmap and actionable steps to prepare their financial advice business for a successful exit or acquisition. They will learn how to align their strategic objectives with the valuation process, establish realistic timelines, assemble a qualified team of professionals, and execute a well-planned transition that maximises value.

Brian Hill MSc DipFA DBAII CEPA, The Exit Partnership

14:20 - 14:25 Chairs 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.

