



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Tyne Tees Regional Conference Q1
2020

Venue:

Ramside Hall Hotel & Golf Club, Ramside Hall Hotel, Durham, DH1
1TD

Date:

Thursday 27 Feb 2020



In association with our Partners in Professionalism:



27-Feb-2020

08:45 - 09:30 Delegate Registration

09:30 - 09:40 Chair's Welcome

John Bruce, Bruce & Co Legal & Financial Ltd

09:40 - 10:15 Does the economic cycle still work?

- Understand how the traditional economic cycle works
- Consider the main issues that are challenging the established cycle
- Describe actions that can be taken to manage portfolios in uncertain times

Paul Pugh, Legal & General Investment Management

10:15 - 10:50 Active Minds – More than meets the eye: The transformation of Japan

- Explain the ways in which the Japanese economy has transformed its approach to corporate governance
- Understand the transformational impact that demographics are having on Japanese manufacturing and workforce
- Discuss the opportunities that are arising and how to take advantage of them

Chris Johns, Jupiter Asset Management

10:50 - 10:55 Professional Qualifications Officer

10:55 - 11:20 Morning Break

11:20 - 11:25 Chartered Champion

11:25 - 12:00 How To Embrace ESG Into Your Investment Proposition

- A full understanding of the terminology and jargon used in the management and marketing of 'responsible' funds
- An understanding of the proposed regulatory approach
- The ability to differentiate between and to select the relevant responsible funds to meet your clients' needs
- The ability to construct portfolio solutions with a responsible approach to investing
- The ability to clearly articulate your corporate approach and the messaging around investing responsibly

Steve Kenny, Square Mile

12:00 - 12:35 Dissecting income for 2020 and beyond

- Recognise some of the key structural trends that have suppressed yields and the outlook for income-generating assets in

2020

- Gain an insight into how to navigate an environment where the overall prospects for dividend growth appear more subdued
- Understand the benefits that fixed income offers a diversified portfolio and how to effectively balance duration and credit risk in today's environment

James Bird, Fidelity International

12:35 - 13:10 **Dealing with Risk: From Clients, from Markets, from Investment Managers**

- Understand the breadth of risks you are exposed to, from market shocks to client responses
- Appreciate some of the risk management techniques available to you
- Recognise that risk management is a form of preparation—you must deal with it today to protect against future outcomes

Keith Speck , Morningstar Investment Management

13:10 - 13:15 **Education Outreach Ambassador**

13:15 - 13:55 **Lunch**

13:55 - 14:00 **Membership Officer**

14:00 - 14:35 **ESG Fundamentals and the Meaning of Stewardship**

- Understand the evolution of ESG and its involvement in investing today
- Learn how ESG risks can be incorporated into company valuation mechanisms

- Identifying the role asset managers should play as Stewards of client money

John Pringle , Sarasin & Partners

14:35 - 15:10 How to articulate the value of advice

- The words and phrases to use so advisers can articulate value more easily.
- How to maintain confidence with clients if fees are challenged.
- Suitable language suggestions to articulate the value advisers provide, with practical examples.
- New opportunities and how to get new clients using the exact words.

Bernie De Souza, Executive Business Coach

15:10 - 15:20 Coffee grab

15:20 - 15:55 Designing a Protection Portfolio

- Have an awareness of the current state of the protection market and the opportunities that come with proper financial advice
- Be able to profile protection risks and probability to your clients
- Understand how to position and help your clients prioritise their protection needs and objectives as part of your fact finding discussions
- Have some ideas about how to ask the right questions to position protection features and benefits to help you build a tailored solution
- Understand how to design a sophisticated Protection Portfolio which serves to address multiple client protection needs and objectives

Gregor Sked, Royal London

15:55 - 16:00



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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.

