

Day 1

25 May 2016

Pre-conference Workshop Programme

Best Practice Data Visualisation and Report Writing

	Room
12:30 Coffee and registration	
12:50 Course leaders opening remarks Nick Maidment, Strategic Partnerships Business Development Manager, Octopus Investments	Stratford
13:00 Telling compelling stories using data - Adding clarity not decoration - What works in data visualisation and why - Key components of a successful data-driven story - Data in context: How different types of communications require different approaches Alan Rutter, Data Visualisation Expert, Clever Boxer	Stratford
14:00 How people interpret visual information - Selecting the right chart, graphs or image - Understanding layers and hierarchies of information - Repeatable design drinks that enhance the message Alan Rutter, Data Visualisation Expert, Clever Boxer	Stratford
15:00 Coffee break	Grange
15:15 Report writing made simple – part 1 - How to assess your reader, what they want, what they need and a series of models - Explore simple structures to organise your message quickly and clearly to busy readers - Examine how we read in print, on screen, and how to write for both Sue Calthorpe, Report Writing Expert, The Clive Davis Partnership	Stratford
16:15 Report writing made simple – part 2 - How to make sure your reports are read and understood - Discover the 'Six Bar Grid' to present must know facts in successful summaries - Learn what works well, what can be improved and how lessons can be app	Stratford
17:15 Workshop closes	
19:00 Welcoming drinks reception (casual dress code)	Terrace Bar
19:45 Conference dinner	

Day 2

26 May 2016

Conference Programme

Room

08:20 Coffee and registration

Grange

08:50 Welcome remarks from the CISI

Kenilworth 2 & 3

08:55 Welcome remarks from the co-chairpersons

Kenilworth 2 & 3

Farida Hassanali CFP™ APP Chartered MCSI, Paraplanner, UBS and Chair of the Paraplanner Interest Group, CISI

Dan Atkinson APP ACSI, Senior Technical Consultant, EQ Wealth and IFP Paraplanner of the Year, 2014

09:00 SESSION 1: Getting better never stops

Kenilworth 2 & 3

Adam Wareing CFP™ APP Chartered MCSI, Head of Paraplanning at Clarion Wealth Planning and IFP Paraplanner of the Year 2015

09:10 SESSION 2: Influencing with impact – leadership and teamwork lessons from the front line

Kenilworth 2 & 3

Bob Fraser MBE, Former Lieutenant Colonel, British Army and Former Senior Client Partner, Towry

As paraplanners, you are required to collaborate with advisors and convince them, as well as their clients, to buy into your product selections, and influence with impact in high pressure scenarios. In this unique keynote address the speaker, a former Lieutenant Colonel in the British Army turned financial planner, will talk through how paraplanners can influence with impact and work with advisors, and what methods will work in high pressure environments – drawing on his experience from both careers.

09:45 SESSION 3: Technology trends in the paraplanning process

Kenilworth 2 & 3

Colin Sloss, Senior Business Development Manager, IRESS

Technology can play a key role in providing efficiency gains for paraplanners when managing large workloads for advisors with multiple clients. Current and emerging technology such as cloud based solutions, mobile technology and advancements in automation can provide increased control, consistency and transparency in the advice process. In this session the speaker, a leading technology expert, will talk through the range of technology available to paraplanners, addressing their benefits as well as their limitations.

Room

- 10:15** **SESSION 4: The investment outlook and implications for paraplanners** Kenilworth 2 & 3
- Justin Urquhart Stewart ACSI, Co-Founder and Head of Corporate Development, Seven Investment Management**
- When it comes to researching and recommending financial products to clients, a thorough and up to date understanding of the investment environment is of vital importance to paraplanners. Complexities across asset classes, market movements, inflation, interest rate changes as well as financial and non-financial risk at the macro level need to be analysed and considered when offering advice, and this keynote address will look to provide the latest updates across all of these areas.
- 10:50** **Coffee break** Grange
- 11:10** **SESSION 5: Research and due diligence in the advice process** Kenilworth 2 & 3
- Christopher Hewitt, Lead Associate, Financial Conduct Authority**
- Following the Financial Conduct Authority's thematic review of research and due diligence of products and platforms, this session will focus on their key findings with a specific focus on good and poor practice examples. The session will provide insights into how you can review your own approach to research and due diligence.
- 11:50** **SESSION 6: Championing ethical behaviour** Kenilworth 2 & 3
- Rebecca Doodson, Manager, Ethics and Integrity, CISI**
- Being ethical, honest and providing services with integrity is of vital importance to ensure the paraplanning profession maintains the confidence of its clients, as well as to provide an example to the wider financial services community. In this keynote address, the speaker will outline what constitutes ethical behaviour, what the key risks are to paraplanners and how best to overcome them.
- 12:15** **Lunch** Grange



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**STREAM A –
PERSONAL AND
TECHNICAL SKILLS**

[Hamlet]

SESSION 7

**Advanced
Excel skills**

**13:00 –
14:00**

Judith Rowe,
Solutions Support
Manager,
AXA Wealth

14:00

Stream change

SESSION 8

**Developing a career
path in paraplanning**

**14:10 –
15:10**

Nick Grogan CFP™
Chartered MCSI,
Paraplanner, PWS
Financial Consulting

Alex Lannin, Technical
Services Manager,
Francis Clark Financial
Planning

15:10

**Coffee break and
stream change**

SESSION 9

**15:30 –
16:30**

**Workflow
management
strategies**

Michelle Hoskin,
Founder and
Director, Standards
International

16:30

**Move to plenary
room for closing
keynote**

**STREAM B –
INVESTMENTS
& FINANCIAL
MODELLING**

[Othello]

**Tax efficient
investments**

Ian Robson,
Senior Business
Development
Manager,
TIME Investments

Stream change

**Cash flow modelling
techniques**

Andrew Moore,
Director, Goodmans
Financial Planning

**Coffee break and
stream change**

**Understanding
company accounts
and ratio analysis –
advice for small firms**

Rob Stevenson
CFP™ Chartered
MCSI, Director,
SRG Financial
Management

**Move to plenary
room for closing
keynote**

**STREAM C –
RISK, TAX
& PENSIONS**

[Kenilworth 1]

**Understanding and
communicating risk
to your clients**

Nick Grogan CFP™
Chartered MCSI,
Paraplanner, PWS
Financial Consulting

Stream change

**New developments
in inheritance tax**

Nick Maidment,
Strategic
Partnerships Business
Development
Manager, Octopus
Investments

Anna Pollins,
Strategic Partnerships
Manager, Octopus
Investments

**Coffee break and
stream change**

**The evolving
pensions regulatory
landscape**

Fiona Tait, Business
Development
Manager, Royal
London Group and
Vice President, The
Insurance Society of
Edinburgh

**Move to plenary
room for closing
keynote**

Room

Kenilworth 2 & 3

16:35 **SESSION 10: Learning from your mistakes - the case of Ratners Group**

Gerald Ratner, Former Chief Executive, Ratners Group

Getting better never stops, and learning from the mistakes you make will help drive continuous self-improvement along the way. However, what if you made a mistake so bad, it resulted in the financial and reputational downfall of your company? Gerald Ratner, formerly chief executive of the Ratners Group knows all too well how this feels, but more importantly, how to learn from mistakes, improve and eventually get back on track. In this entertaining closing keynote address, Gerald will provide key lessons for paraplanners based on his own life experience.

16:55 **Closing remarks from the co-chairpersons**

Farida Hassanali CFP™ APP Chartered MCSI, Paraplanner, UBS and Chair of the Paraplanner Interest Group, CISI

Dan Atkinson APP ACSI, Senior Technical Consultant, EQ Wealth and IFP Paraplanner of the Year, 2014