

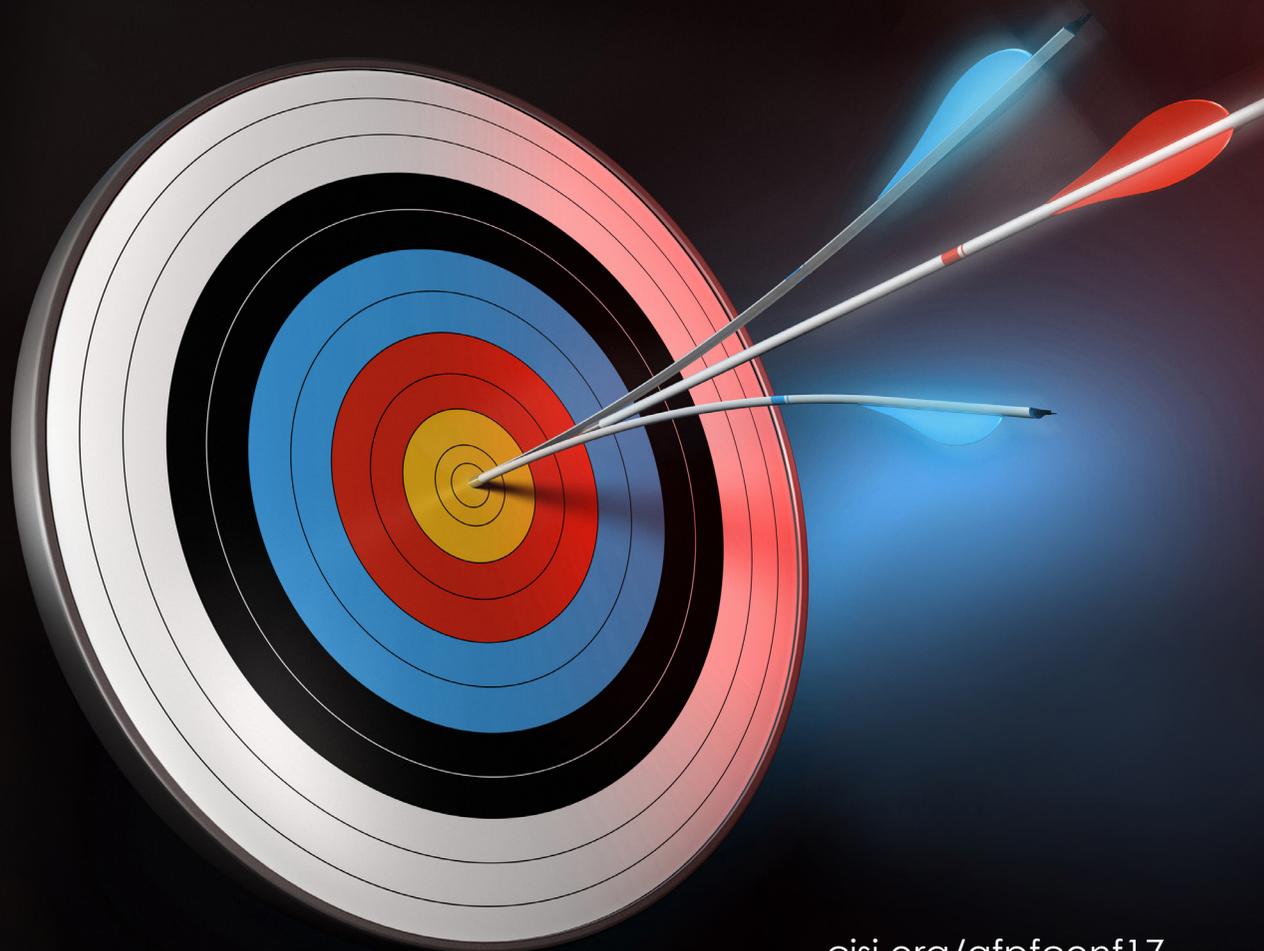
The Accredited Financial Planning Firms™ Conference & Dinner

Exceeding Expectations

Demonstrate excellence in everything you do

CISI
CHARTERED INSTITUTE FOR
SECURITIES & INVESTMENT

25
YEARS



Date: Tuesday 25 April 2017 & Wednesday 26 April 2017
Time: 09:00: Coffee and registration; 09:30: Conference; 16:30: Ends
CPD: 5.0 hours
Pricing: £129 – Conference and Dinner; £99 - Conference only; £199 - Accommodation
Venue: Double Tree by Hilton Hotel
London Victoria, 2 Bridge Place, London SW1V 1QA

Developed in close coordination with our Financial Planning Forum Committee, this year's programme will cover key topic areas including but not limited to building trust with clients, navigating your practice through economic downturns, handling clinical negligence claims, practice management tricks and tips, as well as an insight into the decision making of millennials – clients of the future.

09:00	Coffee and registration	15:05	SESSION VI: How can financial planners and accountants work together to achieve positive client outcomes?
09:30	SESSION I: What constitutes a great Accredited Financial Planning Firm™? Campbell Edgar CFP™ Chartered FCSI, Head of Financial Planning, CISI Sandy Robertson CFP™ Chartered FCSI, Managing Director, Acumen Financial Planning	15:35	Coffee break
10:10	SESSION II: Exceeding client expectations through trust building Carolyn Gown CFP™ Chartered FCSI, Director, Bloomsbury Wealth	15:45	SESSION VII: The benefits of SIFA membership to Accredited Financial Planning Firms *Exclusive discounts for delegates* Ian Muirhead, Chairman, SIFA
11:10	Coffee break	15:55	SESSION VIII: Inside the mind of millennials: how are they making financial decisions? Sophie Robson, Consultant, MRM and Author of "Generation Y: the (modern) world of personal finance"
11:25	SESSION III: Navigating your practice through economic downturns Penny Haslam, Professional Speaker and Former Broadcast Journalist	16:25	Closing remarks from the CISI Campbell Edgar CFP™ Chartered FCSI, Head of Financial Planning, CISI
12:25	Lunch	16:30	Close
13:35	SESSION IV: Interactive panel discussion: tricks and tips for making your practice more efficient Panellists to be confirmed		
14:35	SESSION V: Involving a financial planner in clinical negligence claims: what are the benefits to claimants? Speaker to be confirmed		

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