

CISI



CHARTERED INSTITUTE FOR
SECURITIES & INVESTMENT

25 YEARS



INSTITUTE OF
FINANCIAL
PLANNING

Conference Programme (13 June) Pre-Conference Workshop and Dinner

- 12:00 Registration with light sandwich buffet**
- 13:00 Excel Training Part 1**
Judith Rowe, Solutions Support Manager, AXA Technology Services
- 14:30 Coffee break and check into rooms**
- 15:00 Excel Training Part 2**
Judith Rowe, Solutions Support Manager, AXA Technology Services
- 16:30 Close**
- 18:00 Pre-dinner drinks reception**
- 19:00 Dinner**



Conference Programme (14 June)

Main Conference Programme

08:20 Registration and networking in the exhibition area

08:50 Welcome from the CISI

Dan Atkinson APP ACSI, Head of Technical, EQ Investors
Farida Hassanali CFP™ APP Chartered MCSI, Paraplanner, UBS Wealth Management

09:00 Paraplanning for later life and vulnerable clients

Jan Holt, Head of Business Development Team, Just (Formerly Just Retirement)

09:45 Suitability and disclosure – what you need to know

Chris Hewitt, Technical Specialist, Financial Conduct Authority

10:30 Coffee break and networking in the exhibition area

11:00 The future of ethical investing

John Ditchfield, Co-Chair, Ethical Investment Association

11:45 Sustainable withdrawal strategies

Abraham Okusanya CFP™APP Chartered MCSI, Director, FinalytiQ Limited

12:30 Lunch in the exhibition area



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13:30 Move to stream sessions

Stream A

Pensions paraplanning

Bob Gordon, Pensions
Consultancy Manager,
Standard Life

Stream B

Best practice report writing

Heather Tracey, Report
Writing Expert

Stream C

Planning for divorces

Paul Cobley CFP™
Chartered MCSI, Director,
Oak Barn Financial
Planning

14:45 Coffee break and networking

15:15 Move to stream sessions

Stream A

Trust and tax planning

Ian Maston, Owner,
Mastoni Tax

Stream B

Cashflow modelling

Julie Lord CFP™ Chartered
FCSI, Director, Prestwood
Software

Stream C

Due-diligence on platforms

Mark Polson, Principal, the
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16:30 Motivational session: being extraordinary

Mandy Hickson, Former Fighter Pilot, Royal Air Force

16:50 Closing remarks from the CISI

Dan Atkinson APP ACSI, Head of Technical, EQ Investors

Farida Hassanali CFP™ APP Chartered MCSI, Paraplanner, UBS Wealth Management

