CISI
CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT

THE PARAPLANNER CONFERENCE 2019

17-18 June 2019 - Crowne Plaza, Stratford-Upon-Avon

Lead Sponsor

JUST.

RETHINK RETIREMENT

Workshop Sponsor

Schroders

Pre-conference workshop June 17 and dinner

12:00	Registration and light lunch buffet
13:00	Working with improvisers: the strange world of decision-making *Stuart Podmore, investment propositions director, Schroders*
13:45	Legal and financial matters for older people *Tish Hanifan, joint chair, Society of Later Life Advisers* Moving on from the 2018 FCA papers about vulnerable clients, this session looks to discover where the remaining issues and pitfalls arise. Case studies will be used to demonstrate relevant points to consider when preparing financial plans for clients.
14:30	*Networking coffee break*
15:00	How best to speak up without overstepping the mark *Cathy Stewart, principal, Cathy Stewart Associates* How to effectively share ideas for change within your firm and ensure that your point is correctly heard and understood, without overstepping the mark and upsetting colleagues.
15:45	Personality traits *Dee Cooper, director, Agar Management Consultancy* What type of personality are you? How can you use this knowledge of yourself to aid communication with others? An interactive and fun session to get you thinking.
16:30	Workshop closes
18:00	Evening drinks reception and dinner
19:30	Team quiz

Conference programme 18 June

08:15	Registration and networking in the exhibition area	
08:45	**Welcome** *Jacqueline Lockie CFP™ Chartered FCSI, head of financial planning, CISI*	
09:15	**Retirement planning – covering all the bases** *Martin Lines, head of business development, JUST* When it comes to retirement planning, many firms are putting in place a centralised retirement proposition. Clearly, there are new opportunities and risks to consider aside from the investment journey itself. This session highlights some of the planning stages you can put into place to cover all the bases.	
10:15	**Sharing my career journey as a paraplanner** *Rebecca Tuck APP Chartered MCSI, paraplanner, Magenta Financial Planning* Rebecca, CISI's Paraplanner of the Year 2018, talks about her career, from its start in 2013 in a large wealth management firm to her current role, building a business with Magenta Financial Planning.	
10:45	*Coffee break and networking in the exhibition area*	
Streams	Stream A	Stream B
11:15	**Ethics case study** *Rebecca Aston, head of professional standards, CISI* A fully interactive session looking at a real financial planning client dilemma. With your opportunity to vote for what you think the individual should do.	**Ethical investing** *Vicki Bakhshi, co-head of responsible investment, BMO GAM* Ethical and sustainable investing is sometimes regarded as a non-essential part of a portfolio, but is in fact of fundamental importance. This session will increase familiarity with concepts and phrases such as 'sustainable investment', and 'environmental, social and governance'. We also consider the various approaches used for investing ethically, and how ethical investing can be implemented to achieve optimal ethical value for your clients.
12:00	**How to create engaging reports** *Mana Habibian, Venngage* Delving into some best practices for report design, this session will cover how to balance text with visuals, choosing colours, fonts, text hierarchy, branding, report layouts and how to visualise your data.	
12:45	*Networking lunch in the exhibition area*	

Streams	STREAM A	STREAM B
13:30	**Panel session: Paraplanning in big and small firms** *Chets Ravalia CFP™ Chartered MCSI, paraplanner manager, Cooper Parry Wealth* *Joanna Hague CFP™ APP Chartered MCSI, paraplanner, Investment for Life* *Dan Atkinson APP Chartered MCSI, head of technical, EQ Investors* A panel discussion will cover differences in a paraplanner's role between a big firm and a small firm, what the big firms can learn from the small firms and vice versa. The discussion will also look at how firms assess and evidence a client's capacity for loss.	**Risk profiling accounting for behavioural biases** *Dr Alex Chase, Oxford Risk* Great insights into risk profiling, behaviour bias and how we can all do it better.
14:15	*Move to next stream*	

Streams	STREAM A	STREAM B
14:20	**Trusts – technical intricacies** *Andy Zanelli, technical engagement manager, Standard Life* A deep dive into the detail of trusts, including case law and tribunals news and updates. Case studies will be used to demonstrate relevant points.	**DB pension transfers – how to use cashflow effectively to help clients meet their needs** *Gareth Davies, Scottish Widows* A look at the changes to pension transfers that came into force in October 2018 with the FCA's PS 18/6 and PS 18/20, and what paraplanners should be doing differently. It will include an update on what's changed, and how Appropriate Pension Transfer Analysis requires us to take into account the impact of taxes and entitlements. State benefits are sometimes disregarded and otherwise unknown. The discussion will look at what paraplanners have learnt since the rules were implemented, along with further rules that were implemented in January 2019.
15:20	*Coffee break and networking in the exhibition area*	
15:45	**Closing motivational session** *Hannah Fry, mathematician & broadcaster* What has maths ever done for me? Hannah Fry draws on her wealth of knowledge, research, experience and her fabulous wit to give us a whistle-stop tour of how a mathematician's mind and a love of numbers and data can put us on top.	
16:30	**Close**	