



The Financial Planning
Annual Conference

25 – 27 September 2017
Celtic Manor, Wales

With topics
dedicated to
wealth and
investment
managers

Focus on the Future

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It's simple. We have a content stream specifically for wealth and investment managers on **the second day** of our conference.

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The Five-Star Conference Venue – Celtic Manor Resort



Tuesday 26 September - Day 2 Programme Highlights (08:45 - 17:30)

08:45 - The Future of the UK Financial Services (CPD: 45 Minutes)

Sir Steve Webb, Director of Policy and External Communications, Royal London

09:30 - Understanding clients: what they value in an adviser relationship (CPD: 45 Minutes)

Mark Gochnour, Head of Advisor Services, Dimensional Fund Advisors

10:15 - Panel discussion: the risks and rewards of Robo-Advice (CPD: 45 Minutes)

Chair: Philippa Hann, Partner, Clarke Willmott
Michelle Pearce, Co-Founder and Chief Investment Officer, Wealthify
Further panellists to be confirmed

11:30 - Current asset allocation models and concepts (CPD: 1 Hour)

Edward Smith, Asset Allocation Strategist, Rathbones

13:45 - The changing investment research market under MiFID II (CPD: 1 Hour)

Alistair Haig, Research and Teaching Fellow, University of Edinburgh Business School

15:15 - Alternatives: what opportunities are available to investors? (CPD: 1 Hour)

Josh Matthews, Managing Partner, MASECO Private Wealth

16:25 - Active and passive investing in 2017 and beyond: what approach is best for your clients? (CPD: 1 Hour)

Marcus Brookes, Head of Multi-Manager, Schroders
Jonathon Gumpel ACSI, Co-Founder and Director, Brooks Macdonald
Further panellists to be confirmed

View the full programme at cisi.org/fpac17

How much will this experience cost?

The Wealth and Investment Management Package will cost you only £213.56 (+accommodation*).

How to book

1. Book online at
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2. Contact Marcia.Dodd@cisi.org
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* Accommodation: Single B&B: £150. Shared B&B: £85 per person