Opening keynote: Best practice sharing globally
Noel Maye, CEO, Financial Planning Standards Board

There are many advantages of being part of a global community of financial planners. During the pandemic we have been able to share our experiences and support each other during these uncertain times. What can CISI and FPSB do to support you as financial planners and how can we work together to support the public now and into the future?

How to be a fully virtual financial planner
Speaker TBC

Hear from a planner who was fully virtual before 2020. What is the model and how does it work? What lessons can we learn and incorporate into our professional practice?

Client experience and F.I.R.E; Financial Independence, Retire Early
Barney Whiter, AKA The Escape Artist

The Financial Independence, Retire Early movement has been taking the US by storm for some time and has a growing following in the UK. Barney, known as The Escape Artist, retired at 42 from his job as an accountant and now coaches, consults and writes on F.I.R.E. He will share with the audience why they need to know about F.I.R.E. and how it might be incorporated by financial planners into their conversations with clients.

Financial abuse, coercion and assessing mental capacity globally
Martin Lines, Business Development Director, JUST

Identifying and dealing with potential financial abuse and coercion is a very pressing matter. Financial planners are at the forefront of identifying these issues. But what are the common markers for both financial abuse and coercion? How should planners handle the matter if it becomes apparent during a client meeting?
Roundtables: Q&A with speakers and sponsors

Couldn’t be in two places at the same time or had a burning question you wanted a speaker to answer? This is your chance. All speakers from the stream sessions will participate in an open Q&A session. Join a table with a speaker you’d like to put your questions to and ask away!

Hire, train and keep the right people

Lien Luu, CFP™, Senior Lecturer, Coventry University
Kevin Keller, CEO, CFP Board, USA
Hosts of Adviser Gap Podcast;
James Mousley, Matthews Comfort Financial Planning and Sean Banks, Premier Companies UK.

How are UK universities playing a role in developing the next generation of financial planners?
What are young people looking for from the profession to make it a worthwhile long-term career?
What can we learn from the CFP Board’s research on job analysis and apply to building career paths?
Our panel answer all of this and more.

Gaining CFP™ certification in the UK; Inside-track, process and tips

Steve Martin CFP™ Chartered MCSI, Smart Financial
Speaker TBC

A panel of veteran and newly qualified CFP™ professionals discuss the value of the designation and the process of gaining it. Learn how the CFP™ qualification has transformed the way they give advice. Find out what is involved and what has changed. What you need to do to pass, pitfalls to avoid and how best to prepare. Ask the panel your own burning questions too.

The practical impact of ethics when giving financial planning advice to your clients

Speaker TBC

Bringing ethics and practice standards together has the biggest impact on good client outcomes. A session with an international CFP™ practitioner perspective on the practical application of ethics in the workplace.

TUESDAY 13 OCTOBER 2020 (WEST) EVENING

17:30
The Online Awards Gala and social soirée

Join us after a short break for a relaxed evening of free networking and to celebrate the achievements of the 2020 Financial Planning Award winners. Black tie optional.

The afterparty

For those who love the social aspect of the conference, an opportunity to stay on and catch up with those you last saw at last year’s conference.
WEDNESDAY 14 OCTOBER 2020 (EAST)
09:00 - 13:00

09:00
Best practice sharing globally; a summary of the conference so far
Martin Ruskin CFP Chartered FCSI
Paradigm Norton Financial Planning,
Chairman of CISI Financial Planning Forum Committee

Developing good client service standards that are good for your clients and your business
Speaker TBA
Financial planning can be a real-life changer for clients if done well. But execution of all aspects is of paramount importance.
Our speaker will share how their firm has changed the way they serve clients and the hugely beneficial impact it has had on everyone.

The one-page financial plan
Speaker TBA
As technology accelerates the use of tools in the financial planning arena, some have questioned how to best present the outputs from these plans to clients.
Hear from one of the pioneers of this approach to find out how you cut the traditional 60-80-page financial plan down to one and if indeed it works. We ask them how clients respond to the one-page financial plan and how it the advice process.

Understanding financial decision making in retirement
Speakers TBA
A session sharing a research piece with over 2,000 retirees to understand their financial decision-making. Hear the research findings and learn how a range of factors including product knowledge, decision-making style and self-confidence influence the financial product choices of retirees.

What would you do? Discussion and voting on a real financial planner’s dilemma
Piers Connolly, Head of Professional Standards, CISI
Financial Planning case study
How your culture can drive the growth in your business
Barry Horner CFP™ Chartered MCSI CEO, Paradigm Norton Financial Planning
The culture of your business is key in determining your direction of travel. Barry draws on his decades of experience to share his top tips on generating a culture that runs through staff and clients and is a force for good. He will also shed light on how to manage deterioration or changes in culture that can have potentially damaging effects.

How financial planning can serve millennials
Speaker TBA
An examination of an alternative model for service provision. Online, low cost life planning, education and budgeting all turned into a simple proposition for millennial clients. An opportunity to ask ourselves; How do we do business better or differently?

Planning with couples who differ in how they handle money
Speaker TBA
When there is a clear difference in how two people treat money. What can we do to accommodate their differences?

Roundtables: Q&A with speakers and sponsors
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Closing keynote:
Speaker TBA

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