<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>08:15</td>
<td>Starting grid: Registration and refreshments</td>
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<tr>
<td>08:45</td>
<td>Welcome and behind the scenes at CISI</td>
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<tr>
<td>09:15</td>
<td>Opening keynote: Beautiful Chaos</td>
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Ben Ryan

It is late 2013. Ben Ryan, a red-haired, 40-something, spectacle-wearing Englishman, is given 20 minutes to decide whether he wants to coach Fiji’s rugby sevens team, with the aim of taking them to the nation’s first-ever Olympic medal. He has never been to Fiji. There has been no discussion of contracts or salary. He says yes – and plays his part in writing history.


Ben shares moving stories and lessons learned regarding collaboration, teamwork, communication and active cultures that inspire new thinking on topics such as effective methods to build trust, accelerating human potential and developing optimal performance in teams.
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<tr>
<th>STREAMS</th>
<th>NEW THINKING</th>
<th>TECHNICAL TUNE-UP</th>
<th>SUPPORTING A NEW GENERATION OF FINANCIAL PLANNERS</th>
<th>NEW BUSINESS ENHANCEMENTS</th>
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<tr>
<td>10:00</td>
<td>Client experience and F.I.R.E; Financial Independence, Retire Early</td>
<td>Are portfolios ready for the new low carbon environment?</td>
<td>Career paths for the next generation</td>
<td>Lessons learned; Business continuity and planning in times of crisis</td>
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|         | 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 planners into their process. | Michael Azlen CAIA  
CEO, Carbon Cap Management LLP  
This session on Climate Change guides the audience through the scientific evidence as well as the potential impacts on society and public equity and debt markets. Mike will review how governments and policy makers are responding to the threat and highlight the specific risks and opportunities created by climate change. Finally, he will summarize and provide actionable steps that financial planners, investors, risk managers and business leaders need to consider. | Led by Lien Luu  
Senior Lecturer, Coventry University  
A roundtable session for those looking at growing and developing their teams. Lien will be joined by students and newly qualified planners as well as those with experience of hiring young planners to look at the content being covered in university courses and the skills that graduates and apprentices bring with them. We will ask if there is a mismatch between the skills being developed and the jobs available and how the planning community can create standardised career paths to develop and grow the profession. | Sarah Lord CFP™ Chartered MCSI  
Chief Client Officer, Succession Wealth  
Some months ago, Sarah designed a crisis response plan for the business. In this session she shares the business plan and talks through the highs and lows of the 'new world'. What lessons have we learned? What could we have done better or differently? If severe and prolonged disruption happened again, what would, or should we do differently? |

10:45 Pit stop: Refreshments and networking
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<td>11:15</td>
<td>World café; How will global financial planning change and benefit our clients? Share best practice with peers and hear their thoughts and experience on how a global pandemic has changed business, clients’ needs and desires. How has business been fundamentally transformed and what is immutable? What have we all learnt during the course of 2020 and how will this change and benefit the financial planning profession?</td>
<td>IHT tax planning when intergenerational planning Speaker to be confirmed The common mistakes and issues that lawyers see when reviewing financial planning advice given to clients. What planners can do to ensure that all is in order and practical tips on how to explain the legal technicalities to clients.</td>
<td>Developing the next generation of planners; What we want! Sean Banks and James Mousley Hosts, The Adviser Gap Podcast Sean and James will draw on their wealth of experience to share their thoughts on how a young planner should position themselves in a business, when and how to articulate your ambitions as a newly qualified planner and what to do once you’ve got all the technical qualifications. An opportunity to hear some personal top tips from both Sean and James for getting on in the profession and pose your own questions.</td>
<td>How to market your financial planning services to potential clients in this ‘new world’ Speaker to be confirmed In 2020 how we do business and communicate with existing, new and potential clients has seen tremendous change. This session looks at the new opportunities afforded to financial planning businesses, what businesses should and shouldn’t be doing now in terms of marketing, and what has changed.</td>
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12:15 Pit stop: Lunch and networking
### Planning for Generations XYZ
**Speaker to be confirmed**

The demographics of our clients are changing as baby boomers redefine retirement and members of Generation X step into their prime earning years. Millennials are buying homes and having children and Generation Z is stepping into the workforce for the first time amid huge global change. It is crucial for planners to see the world through their eyes and meet each client in their current stage to create more empathetic, personal and customised experiences.

### Financial abuse, coercion and assessing mental capacity
**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?

### Gaining CFP™ certification; Inside-track, process and tips
**Confirmed panellist:**

- **Steve Martin CFP™ Chartered MCSI**
  Smart Financial

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.

### 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.

### Roundtables: Q&A with stream session speakers

**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. Turn up, sit at a table with a speaker you’d like to put your questions to and ask away!

### Pit stop: Refreshments and networking
Closing keynote

Adrian Newey OBE, Chief Technical Officer, Red Bull Racing

Widely lauded as the most iconic racing car designer in Formula One, Adrian is a legendary name in race engineering. Having enjoyed vast success in one of the world's most technologically complex sports, Adrian's designs have gone on to win an astonishing number of races.

Adrian talks about peak performance – and how to stay ahead of the competition in a sport where races can be won or lost by fractions of a second. Providing insight into the technical intricacies associated with Formula One, Adrian conveys the strength and perseverance needed to reach the top.

16:00 Chequered flag: Conference ends