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FINANCIAL PLANNING CONFERENCE 2026

8-9 October

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7 October: Charity Golf Day

11.00 Windlesham Golf Club, Grove End, Bagshot, Surrey GU19 5HY

8 October: Day 1

09:00 - 10:20 **Registration**

09:30 - 10:15

Breakfast Stream 1 (Beaumont Room)	Breakfast Stream 2 (Hampton Suite)
Getting Copilot to augment your business *Oliver Bourke, Mercury Wealth Management* • Using SharePoint as your central source of knowledge, not just for files • Building training plans/courses with Viva • Getting Copilot to augment your business	**Planning for the long game: Why SEND families need you to show up differently** *Ali Fanshawe, Co-Founder SENDA| COO* This session will introduce the term special educational needs and disabilities, exploring what it means and how it can affect individuals and families. It will consider why planning for those with special needs differs from traditional financial planning, and the importance of getting it right for families who cannot afford mistakes. It will also highlight that effective planning goes beyond finances, focusing on supporting the development of a longer-term life plan.

10:20 **Welcome address**

Host : Jeremy Nicholas, Author & Presenter

Tracy Vegro OBE, CISI, CEO

10:35 - 11:35 **Opening Keynote – Matthew Dicks – Story telling**

Matthew Dicks

Matthew Dicks is an internationally bestselling author, award-winning teacher, and one of the most accomplished storytellers in the world, a 62-time Moth StorySLAM champion and 10-time GrandSLAM winner.

He's not just a storyteller—he's a strategist. For more than a decade, Matt has helped companies like Amazon, Google, and Salesforce. Matt has also consulted with Harvard University and the F.B.I., to unlock the power of stories to drive results. Whether it's a sales pitch, leadership communication, or brand narrative, he helps individuals and teams communicate with clarity, confidence, and connection.

11:35 - 12:35 **Breaking through the ceilings: Findings from the latest global advisor study**

Peter Wozniak, Regional Director, Practice Management, Dimensional Fund

When growing their businesses, advice firms can find that they reach certain ceilings which hamper their progress. Breaking through these ceilings requires the right decisions or strategies. In this session, we'll draw on findings from one of the industry's largest benchmarking studies, the Global Advisor Study, to discuss the ways that High-Performing Firms approach fees, growth, human capi-tal and other challenges.

12:35 - 13:35 **Lunch & Networking**

Q&A with Clarke Wilmott - 'Exiting mature trusts'

	Stream 1 (Hanover Suite)	Stream 2 (Beaumont Room)	Stream 3 (Tudor Room)
13:35 - 14:15	**In or moving on: financial planning for arrivers, and those contemplating a UK exit** *David Denton – Head of Technical, Quilter* Global mobility is accelerating fast, but are the financial attractions of waving goodbye as straightforward as we would like to believe? We take a look at the essential early planning for the well advised, considering property, pensions and other wealth and relevant tax breaks. Yes, tax breaks. For, despite the dismantling of the 'non-dom' regime by Labour, significant alternative tax-breaks now exist – but for whom, how and why? All will be revealed…	**How to attract and convert right-fit clients with ease** *Beth Fitzgerald and Holly Reimel – Advise HER* A practical session that equips firms with a simple, three-step framework advisors can use to communicate their value clearly and memorably. Advisors learn how to replace generic elevator pitches with a magnetic, client-attracting message that sparks genuine conversations, strengthens referrals, and becomes the foundation of their business development efforts.	**AI research and firm usage** *Ian McKenna – Financial Technology Research Centre* This session explores the rapidly evolving potential of AI and its implications for financial planning firms. While the future remains uncertain, firms that adapt their people, skills, and operating models will be best positioned to succeed. With a practical, real-world focus, it highlights how to retrain and repurpose teams now to drive efficiency and unlock AI's full potential.
14:25 - 15:05	**Stream 1 (Hanover Suite)** **Preserving family wealth** *Andrew Day LLB (hons) FPFS CFP™ Depledge Financial* Navigating the great wealth transfer across generations requires careful planning, communication, and strategic thinking to ensure family prosperity endures.	**Stream 2 (Beaumont Room)** **The relationship is the work** *Emma Boardwell* Emotional Finance Financial professionals know that relationships are their differentiator - yet for all the rigour the industry brings to the technical dimension of planning, there is remarkably little attention paid to what exceptional client relationships actually look like, or how to build them by design. Well-intentioned relationships are not the same as well-executed ones. In this session, Emma Boardwell - psychotherapist, financial coach, and founder of Emotional Finance - draws on the one profession that treats the relationship itself as the work, translating insights from psychotherapy into practical tools for building the client relationships that will define the next era of financial advice.	**Stream 3 (Tudor Room)** **Legal claims: issue-spotting for practitioners** *Tony Cockayne, Partner; Jasmine Ivory, Legal Director and Sarah O'Grady, Managing Associate* Financial advisers are often the first to spot the early warning signs of a dispute but recognising when a situation may give rise to a formal legal claim is not always straightforward. This practical session is designed to help advisers identify common "red flags" in contentious trusts and probate matters and in cases involving suspected lifetime financial abuse, so that issues can be addressed early and appropriately. Delivered by experienced solicitors specialising in contested trusts, wills and estates, the session will explore the types of claims that frequently arise following death or during a client's lifetime. The session will also consider scenarios where concerns arise about potential financial exploitation of vulnerable individuals.
15.05 – 15:30	**Refreshment break and networking**		

15:30-15:50 **Global insights in financial planning – FPSB update & CFP celebration**

Dante De Gori, FPSB CEO

Celebrating the CFP class of 2025

15:50-16:45 **Why do good people do bad things?**

Philippa Hann, CEO Paradigm Norton Financial Planning

In this compelling keynote, Philippa Hann explores the hidden fault lines that run beneath every financial organisation and every professional. Drawing on behavioural science, real industry scandals and insights from her forthcoming book The Fault Lines of Finance, she reveals why integrity is far more fragile than most of us realise, and what we can do to protect it.

16.45 – 17:30 **You're wrong about this: A contrarian take on the advice, investment & platform market**

Abraham Okusanya

At any point in time, there are ideas the industry widely accepts as "obvious". Many of them don't stand up to scrutiny.

In this session, Abraham Okusanya takes aim at the most dominant beliefs shaping adviser and investor behaviour right now - using data and evidence to challenge consensus thinking.

Provocative by design, this session will leave you questioning what you think you know - and more confident in what actually matters.

17:30 – 19:00 **Hotel check in / break**

19:00- 23:45 **Awards Ceremony**

9 October: Day 2

08:45 **Registration open**

Welcome coffee with refreshments

09:00 **Welcome address**

Jeremy Nicholas (Host)

09:10 - 10:10 **Rory Sutherland**

Rory Sutherland

Rory Sutherland is a renowned British advertising executive, author, and behavioural science expert serving as Vice Chairman of Ogilvy UK. A former classics teacher, he joined Ogilvy in 1988, later founding its behavioural science practice to apply psychology to marketing. He is known for popularizing the idea that irrational, low-cost solutions often outperform expensive, logical ones.

10.20 -11.00	Stream 1 (Hanover Suite)	Stream 2 (Beaumont Room)	Stream 3 (Tudor Room)
	6 steps to heaven (well at least it will feel like it) *Marlene J Outrim CFP™ Chartered FCSI (Financial Planning) MSc (Econ), Chartered Wealth Manager, Managing Director, UNIQ Family Wealth* *Author of Boomers: Redefining Retirement & Cascading Your Wealth* This session looks at the 6 steps which make up the Financial Planning process and how Planners can make it work its magic for clients and themselves. If you have struggled to make the 6-step process part of your proposition or are new to true Financial Planning and want to find out whether it would make a difference, this is for you.	**IIFPT: The integration premium and why advisors matter** *Michael Kothakota, Wolfbridge Wealth and Colombia University* *Steven Rowe, Lucent Financial Planning* Financial planners know integration creates value. IIFPT illustrates this this research proves it mathematically. Interdependent Integrative Financial Planning Theory demonstrates that coordinated planning across domains delivers 5.9–13.2% more value than siloed advice, measured in client net worth rather than abstract utility. For a £500,000 client, that's £30k-£66k in quantifiable benefit. The framework shows that the whole is greater than the sum of its parts - but they all need to be coordinated. It's the financial planner that generates that premium. Learn how to claim that value with your clients and be proud of it.	**Bad trust, good trust, no trust?** *Les Cameron, Head of Technical, M&G* Ten years on from the Pension Freedoms Budget that transformed the retirement landscape, the Autumn Budget 2024 has brought further change by reshaping the inheritance tax (IHT) landscape. In this session, Les will explore IHT planning in a world where pensions are now within the IHT net, highlighting key considerations and strategies to help manage ever-increasing IHT liabilities.
11.10-11.50	**Matthew Dicks Workshop** *Matthew Dicks* TBA	**Or Networking Break**	

11.55 – 12.35 **Keynote: The top ten AI tools for financial advisers**

Heather Murray, Founder and CEO of AI For Non-Techies

A practical, jargon-free walkthrough of the AI tools transforming how financial advisers work, from cutting admin time to supercharging client relationships. Heather shares exactly how to use each tool, with real prompts and use cases tailored to the financial services sector.

12.35 – 13:30 **Lunch & Networking**

13:30– 14:10	Stream 1 (Hanover Suite)	Stream 2 (Beaumont Room)	Stream 3 (Tudor Room)
	Discovery meetings TBA	**Benefits of creating a personal brand** *Phil Bray, Yardstick* If the phrase "personal brand" makes you think about personal grooming, social media influencers, or just switches you off completely, this session is for you. Like it or not, we all have a personal brand, so we might as well make ours as strong as possible, helping the right people understand who we are, what we stand for, and why they should trust us. In this talk, I'll explain why a strong personal brand helps you win business, attract opportunities, and stand out in a market where so many financial advisers and planners look the same to their target audience. More importantly, I'll show you how to build a personal brand without making you feel uncomfortable.	**Training and development** *Rohan Sivajoti, Plannex* TBA

14:20-15:00	**AI for financial advisers: Live Q&A deep dive** *Heather Murray, Founder and CEO of AI For Non-Techies* Got questions? Bring them. This open, interactive session gives financial advisers the chance to dig deeper into AI adoption, whether that's where to start, what to avoid, or how to apply specific tools to your day-to-day practice. No question is too basic.	**Or Networking Break**	
15:00 – 16:00	**Keynote** *Jamil Qureshi* Performance, behaviour under pressure, and decision-making.		
16:10	**Closing remarks** *Jeremy Nicholas*		
16:20	**Close**		