CISI
CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT

THE PARAPLANNER CONFERENCE 2024

Agenda

22 May 2024

Thinktank Museum, Birmingham

Buy tickets

The Paraplanner Conference 22 May 2024

THE SCIENCE OF DATA IN MODERN PARAPLANNING

08:30 – 09:30	Registration and refreshments	
09:30 – 09:40	Welcome address by Dan Atkinson	
09:40 – 10:00	**Winner of the Paraplanner of the year 2023: Alison Neale, Director, Principal Planning**	
10:00 – 10:45	**What Clients Want** *Blair Anderson, Regional Director, Practice Management & Vice President, Dimensional* Client wants and needs are varied and complex. So, designing a service proposition that can deliver value across a broad range of clients presents advisory firms with some interesting challenges. This presentation draws on Dimensional's extensive studies of global adviser businesses and end investors to better appreciate what it is that clients want and use these insights to solve challenges such as growth, business development and the demonstration of value add.	
	STREAM 1	STREAM 2
10:45 – 11:15	**Bringing Family Income Benefit to life** *Shelley Read, Senior Protection Development and Technical Manager, Royal London* Session to cover: • Assessing needs • Communicating the likelihood of protection being required	**Lifetime allowance** Session to cover: • Moving forward and implications from the abolishment of the lifetime allowance
11:15 – 11:45	Refreshment break	
11:45– 12:30	**Technical paraplanning: Long term care** *Robin Melley TEP, Chartered MCSI, FLIBL, FPFS, Managing Director, Matrix Capital* *Jacqueline Berry, Managing Director, My Care Consultant* Session to cover: • Pensions, estate planning, corporate investing • Long term care	
12:30 – 13:15	Ethics and AI In this session, the expert panel will debate 2 dilemmas with the help of audience participation. Dilemmas include: • Artificial Interruption - An organisation uses AI to help its clients' advice service, but this has unintended consequences on staff when the recommendations made don't align with the clients' requirements. • Social Network - A member of your teams posts information about an influencer who is working closely with the firm, without naming names but highlights their inauthenticity. What do you do? Speakers: *Patricia Barlow, Ethical AI Project* *Matt Toms, Senior Portfolio Manager, Multi Asset Europe, Allianz Global Investors* *Tom Proverbs-Garbett, Associate Director, RSM* 45 minutes ethics CPD	
13:15-14:15	Lunch	

	STREAM 1	STREAM 2
14:15 – 14:45	**Useful resources and best practices: Develop your career with Sian Davies Cole CFP MSCI, Chartered Paraplanner and Director, Plan Works** In this interactive discussion, delegates will be able to share their best tips and tricks in the business, with a key emphasis on knowledge sharing and building a community. Session to cover: • Useful tools for paraplanners • Top tips / lessons learnt • Resources to utilise • Networking groups • Key events for your diary • Mentoring	**Analysing tech solutions** Session to cover: • The importance of due diligence and how to do this effectively • Due diligence on technology – if I want to use cash flow tools in my business, what do I need to do? • Practitioner input • Tools, cyber security, culture, implementation Speakers: *Dan Atkinson, Head of Technical, Paradigm Norton Financial Planning*

14:45 – 15:00 Afternoon break

15:00 – 15:30 **Planning for niche clients**

In this session you will hear three 'TED Talks' from professionals who work with niche clients.

'Sports professionals' by Chris Simpson, Chartered Financial Planner, Mazars Financial Planning

Having transitioned to the profession after a career as a professional sportsman (squash), Chris is particularly passionate about working with current and ex-professional athletes, to help them negotiate the financial difficulties that come with the short lifespan of sporting careers.

Professional athletes are significantly younger than the typical financial planning client, with unpredictable careers that will (at best) come to a close in their mid-thirties. With reportedly 40% of professional footballers declaring bankruptcy post-retirement, what are the specific needs that we need to consider to best advise these clients?

'Complex tax circumstances' by Andrea Solana CFP, Head of Advanced Planning, MASECO

It is not uncommon to encounter clients in the UK where either the individual or a family member has a US connection, whether that be through citizenship, a green card, or physical residency. The US is one of the only countries to tax its citizens and permanent residents on a global basis without regard to actual residency. This means that when considering financial planning for clients in the UK with a US connection, you must factor in two jurisdictions. So, what do we need to consider ensuring that our solutions are optimising tax efficiency in both countries?

Andrea began her career in 2005 with a well-known Washington DC based international tax and global wealth management firm. Andrea regularly writes articles in various expat magazines and is periodically asked for press comment on US expat financial planning topics.

Andrea moved to London in 2013 and joined MASECO in 2014. At MASECO, Andrea is focused on enhancing the delivery of high-quality wealth planning advice to MASECO's Private Wealth Clients and helping all client facing staff stay trained on up to date regulatory and legislative issues facing US families living in the UK.

'Divorce' by Rebecca Lucas, Divorce Specialist, Liora Wealth

Rebecca will talk about what it is like to work with people going through divorce and the special skills needed (both technical and soft skills).

Rebecca is a Chartered Financial Planner and has been in financial services for 24 years. She runs her own boutique IFA firm in Cambridge called Liora Wealth. She is passionate about full financial planning and specialises in helping people going through divorce and also clients at retirement. In the past, Rebecca ran her own outsourced paraplanning firm and was Professional Paraplanner "Paraplanner of the Year", later becoming a judge of the awards.

15:30 – 16:00	**Closing keynote** **Human Touch in a Digital World: Reconnecting Business with Emotion** *Penny Power OBE, LinkedIn Pioneer; Founder, Ecademy; Founder and CEO, Business is Personal* In an era dominated by screens and virtual interactions, the essence of human connection has become more precious than ever. "Human Touch in a Digital World" is not just a talk; it's a movement towards reinvigorating the soul of business in the digital age. Penny, a renowned speaker with a heartfelt mission, invites you on a journey to explore the transformative power of integrating love and genuine connections into the fabric of our professional lives. In this engaging and thought-provoking presentation, Penny delves into the critical importance of bringing humanity back to the forefront of business operations, sales and strategy. With a blend of compelling anecdotes, cutting-edge research, and practical strategies, this talk will challenge you to rethink the role of emotion and human interaction in a digital-first world. Penny's message is clear: In a world where technology continues to advance at an unprecedented rate, the businesses that dare to prioritize love and human connections will be the ones that stand out and flourish. Join Penny for "Human Touch in a Digital World" and be part of the movement towards a more connected, compassionate, and human-centric business landscape.
16:15 – 16:30	**Closing remarks by Dan Atkinson**
16:30– 17:00	Museum exploration and additional networking