CISI

CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT

THE FINANCIAL PLANNING CONFERENCE 2019

30 September – 1 October Birmingham

Sunday

19:00

Welcome drinks

Get together, greet, get ready

Monday

Register, reconnect and refresh

08:30

Welcome address

Michael Cole-Fontayn
Chair, CISI

Martin Ruskin CFP™ Chartered MCSI
Client Director, Paradigm Norton Financial Planning and Chairman of the Financial Planning Forum Committee

Future politics: living together in a world transformed by technology

Jamie Susskind
Author, speaker and barrister

Too clever by half: how intelligent people can minimize mistakes in the advice process

Stuart Podmore
Investment Propositions Director, Schroders

Meet, Mingle, Refresh

11:00

Choose a stream

Focus on your clients

Putting the client first: looking under the bonnet of a financial planning firm

Sapna Shapero, Paraplanner, Chesterton House

Anja Turvey, System Developer, Chesterton House

Spotlight on your business

Client fee agreements and contracts: the legal dos and don'ts

Philippa Hann, Partner, Clark Willmott

Get ahead technically

Tapered annual allowance and the particular problems of funding for high earners

Clare Moffat, Head of Business Development , Royal London

12:15

Time to...

...refuel

Enjoy a wide selection of hot and cold lunch options.

...recharge

Get some fresh air and daylight on a mile walk around the NEC lake.

...reconnect

Meet up with peers and exhibitors

Choose a stream

Focus on your clients

Retirement: probabilities, problems & the power of policy

Amyr Rocha-Lima, Partner, Holland Hann & Wills

Spotlight on your business

Building your business via social media

Roger Whitney CFP™ "The Retirement Answerman", Co-Founder WWK Wealth Advisors

Get ahead technically

Later life advice, IHT planning, keeping assets within the family

Tish Hanifan, Joint Chair, Society of Later Life Advisers (SOLLA)

Choose a stream

Focus on your clients

Countering financial abuse

Erin Linehan, Associate General Counsel, VP- Compliance, Head of Dispute Resolutions and Senior & At-Risk Investors, Raymond James Financial

Spotlight on your business

Marketing your business: how to get the most out of what you spend

Laura Janes, Founder and MD, Uniquity

Get ahead technically

The impact of Product Intervention and Product Governance

Rory Percival, Rory Percival Training and Consultancy

Tea, tour, talk

15:00

CISI update

Jacqueline Lockie CFP™ Chartered FCSI
Head of Financial Planning, CISI

What would you do? Ethics and voting on a real financial planner's dilemma

Rebecca Aston
Head of Professional Standards, CISI

Rest, make use of the hotel's gym and spa, then don your finest to...

...celebrate!

19:00

Join us for the annual celebration of the best in Financial Planning at the 2019 Financial Planning Gala Reception, Dinner and Awards

THE FINANCIAL PLANNING AWARDS 2019

Tuesday

Energise

09:00

Run off the night before with our conference runners or prepare for the day ahead of rich content with your choice from the hearty breakfast buffet.

The thick edge of the wedge: the future for financial services and the client service dynamic

Professor Deen Sanders OAM

Ethics and Professionalism Leader Partner, Governance, Regulation & Conduct, Deloitte-Australia and former Chief Professional Officer at FPA Australia

The importance of working with Vulnerable Clients

Martin Lines

Business Development Director, Just

Revive, review, revisit

10:30

Choose a stream

Focus on your clients

How to find out what's really important to your clients

Andy Jervis CFP™ Chartered MCSI, Director, Chesterton House

Spotlight on your business

How to grow your client base by acquisition

Sandy Robertson CFP™ MCSI, Managing Director, Acumen Financial Planning

Get ahead technically

Portfolio stress testing

Dr Quintin Rayer DPhil, FInstP, SIPC Chartered FCSI, Head of Research and Ethical Investing, P1 Investment Management

Choose a stream

Focus on your clients

The Art of Simplicity

David Swanwick, Head of Client Services, EMEA and vice president, Dimensional Fund Advisors

Spotlight on your business

The GDPR ready practice: what have we learned?

Annabel Kaye, Director Irenicon, Speaker and consultant on Employment law and GDPR

Get ahead technically

Protection: IDD

Stephen Harold Business Protection Specialist, VitalityLife

12:45

Get...

...an update

find out what products and services our exhibitors can offer you and your clients

...fresh air

join us for a lakeside walk to clear the head

...lunch

and we'll keep the caffeine flowing

Whose line is it anyway!

Host: Martin Ruskin CFP™ Chartered MCSI
Client Director, Paradigm Norton and Chairman of Financial Planning Forum Committee

Money, happiness, and the future of financial advice

Brian Portnoy PhD, CFA
Head of Education at Magnetar Capital

...and booksigning

Tea, tour, talk

14:45

Psychology of persuasion and influence

Philip Hesketh
Hesketh Talking

Closing remarks

Simon Culhane, Chartered FCSI
Chief Executive, CISI

Nothing happens... most of the time

Henry Schniewind
Avalanche and Risk Management Expert, Henry's Avalanche Talk (HAT)