Schroders Office, 1 London Wall Place, Barbican, London, EC2Y 5AU

Wednesday 2 December 2026

SCHEDULE OF THE DAY

0830 – 0900	**Registration** – Network with peers over coffee and pastries
0900 – 0910	**Keynote – Welcome.** *With Stuart Podmore, Schroders*
0910 – 0940	**Keynote – Global economic update.** *Speaker to be announced*
0945 – 1045	**ROUNDTABLES** - *Please refer below to get a feel for the topics that will be tabled for discussion with the roundtables*
1045 – 1110	**Coffee Break**
1115-1145	**Structured Networking**
1150- 1205 1205 – 1215	**PowerTalks - Short and punchy presentations to challenge and inspire**
1220-1320	**ROUNDTABLES** - *Please refer below to get a feel for the topics that will be tabled for discussion with the roundtables*
1320 – 1400	**Lunch**
1405 – 1435	**Keynote speaker – From disruption to opportunity in our changing world.** *Speaker to be announced*
1435 – 1505	**Panel Discussion – The future of paraplanning and the winning behaviours.** *Chaired by Stuart Podmore*
1510 -1610	**ROUNDTABLES** - *Please refer below to get a feel for the topics that will be tables for discussion with the roundtables*
1615 – 1645	**Keynote - Closing address.** *With Stuart Podmore, Schroders*
1645 - 1800	**Farewell drinks and networking**

Paraplanning Excellence December 2026

Wednesday 2 December, Schroders’ offices, 1 London Wall Place, London, EC2Y 5AU

Roundtable Agenda

ROUNDTABLE TOPICS

LEADING THROUGH CHANGE

1. Turning expertise into influence

Paraplanners are increasingly influencing business decisions, with the role evolving from technical specialist to strategic business partner. Technical expertise alone is no longer enough. Commercial awareness, communication and the ability to influence decisions are becoming essential skills for the next generation of paraplanners.

This session will explore how paraplanners can increase their strategic impact and become more influential across the advice business, including:

- Developing the commercial awareness needed to support business decision making
- Building leadership capabilities that enable positive change across the advice business
- Communicating complex technical planning with greater clarity and confidence
- Challenging advisers constructively to improve client outcomes and decision making
- Demonstrating measurable business value beyond technical delivery
- Building trusted relationships and influence across advice teams

2. Why every advice firm needs better paraplanning

The industry's biggest growth constraint is no longer demand - it's capacity. As firms seek to improve productivity, paraplanners are becoming central to unlocking adviser time, removing operational friction and improving business performance.

This session will explore:

- Removing adviser bottlenecks to increase client-facing capacity
- Redesigning workflows through smarter delegation and collaboration
- Measuring productivity through outcomes rather than activity
- Creating capacity that supports sustainable business growth
- Demonstrating where paraplanners generate the greatest commercial value

3. How firms are measuring the commercial contribution of paraplanning

For years, paraplanning was been measured by technical excellence. Today, the profession is increasingly being judged by something much broader: its ability to improve productivity, unlock adviser capacity, drive better client outcomes and help reshape the future operating model of financial advice. How should firms measure paraplanning success?

This session will explore:

- Measuring the adviser capacity created by paraplanning teams
- Tracking turnaround times without compromising quality
- Demonstrating the impact on client outcomes and experience

- Balancing technical quality with operational efficiency
- Measuring the benefits of automation and technology adoption
- Evidencing commercial impact across the advice business

THE EVOLVING PROFESSION

4. Why human expertise matters more than ever

As AI takes on more technical analysis, report writing and administrative tasks, the value of the paraplanner is shifting from producing work to validating it. Technical knowledge alone is no longer enough; professional judgement, critical thinking and accountability are becoming the profession's defining strengths.

This session will explore how paraplanners can combine AI with human expertise to improve productivity while maintaining trust, quality and client outcomes, including:

- Applying professional judgement alongside AI-assisted advice
- Reviewing and validating AI-generated technical outputs
- Maintaining accountability through effective human oversight
- Embedding ethics, governance and client protection into advice
- Knowing when to trust, and when to challenge, AI recommendations
- Defining the future role of the paraplanner in an AI-enabled profession

5. The capacity challenge for high-performing paraplanning teams

As advice firms grow, demand for paraplanning continues to outstrip supply. Firms are redesigning teams, redefining roles and investing in technology to increase capacity without compromising quality.

This session will explore what the highest-performing paraplanning functions are doing differently and how firms can build teams that scale with the business, including:

- Designing operating models that support business growth
- Attracting and retaining high-performing paraplanning talent
- Balancing outsourced and in-house capability
- Creating career pathways and succession plans
- Measuring team performance beyond technical output
- Scaling paraplanning functions without sacrificing quality

6. Sustaining high performance in a demanding profession

As the paraplanning role becomes more strategic and technically demanding, maintaining performance is no longer just about technical expertise. Managing workload, avoiding burnout and building resilience are becoming essential skills for sustaining high-quality work, supporting advisers and developing long-term careers.

This session will explore how individuals and firms can create environments where people perform at their best without compromising wellbeing, including:

- Managing workload without compromising quality or wellbeing
- Building resilience in high-pressure technical environments
- Maintaining focus while reducing cognitive overload
- Creating habits that support sustainable high performance
- Building team cultures that promote wellbeing and engagement

REGULATION

7. Good governance in an AI world

As AI becomes embedded within advice firms, governance is becoming as important as technology itself.

This session will examine how firms can evidence oversight, maintain accountability and ensure AI-assisted advice continues to meet regulatory expectations while improving efficiency, including:

- Embedding effective oversight of AI-assisted advice processes
- Maintaining human accountability for client outcomes
- Strengthening record keeping and audit trails
- Building robust quality assurance and validation processes
- Managing operational and regulatory risks associated with AI

8. The great retirement reset

The retirement landscape is changing rapidly. Pension tax reform, inheritance tax changes, longer retirements and evolving decumulation strategies are reshaping the advice clients need.

This session will explore how paraplanners can support advisers in delivering more flexible retirement planning while balancing tax efficiency, sustainability and better long-term client outcomes, including:

- Adapting retirement strategies following pension and tax reforms
- Planning for inheritance tax changes and wealth transfer
- Using cashflow modelling to support better decision making
- Rethinking decumulation strategies for longer retirements
- Delivering greater flexibility while maintaining long-term sustainability

9. How regulation will change financial advice in the next five years

Consumer Duty has fundamentally changed how firms evidence good client outcomes, but it is only the beginning of a broader transformation in financial advice. Regulatory priorities are now shifting towards improving access to advice, enabling innovation and ensuring firms can harness technology without compromising trust or governance.

This session will explore the next wave of regulatory change and what it means for the future role of paraplanners as advice models continue to evolve, including:

- Preparing for the Advice Guidance Boundary Review and Targeted Support
- Understanding simplified advice and evolving advice models
- Responding to AI governance and regulatory expectations
- Strengthening data quality, record keeping and operational resilience
- Preparing firms for the FCA's next phase of supervision

TECHNOLOGY

10. The digital advice journey

AI, automation and digital platforms are transforming how advice is delivered, but technology only creates value when it supports well-designed workflows. As firms invest in increasingly connected advice ecosystems, paraplanners have a critical role in ensuring technology improves consistency, efficiency and client outcomes rather than adding complexity.

This session will explore how firms can build advice journeys where technology and process work together, including:

- Integrating AI effectively into end-to-end advice workflows
- Connecting technology across the entire advice journey
- Eliminating manual hand-offs and operational duplication
- Identifying opportunities for intelligent automation
- Designing scalable digital advice processes that improve client outcomes

11. The AI-enabled paraplanner

The conversation has moved beyond whether paraplanners should use AI to how they can use it to become more effective. As automation takes on more routine technical work, the role is shifting towards analysis, critical thinking and business improvement.

This session will explore how paraplanners can work alongside AI to improve efficiency, enhance advice quality and increase their strategic contribution to advice firms, including:

- Using AI to automate routine technical and administrative work
- Applying professional judgement to AI-generated outputs
- Embedding AI into everyday paraplanning workflows
- Developing the technical and commercial skills needed for the future
- Redefining the role of the paraplanner in an AI-enabled advice firm

12. Data is the new technical skill

As AI becomes embedded across financial advice, the quality of data increasingly determines the quality of advice. Clean, structured and accessible information is becoming as important as technical knowledge itself.

This session will examine why data management is emerging as a core paraplanning capability and how better data can improve productivity, automation and client outcomes, including:

- Improving data quality across advice businesses
- Making better use of CRM systems and client information
- Structuring data to support automation and AI
- Reducing manual processes through better data management
- Building the foundations for AI-ready advice businesses

THE FUTURE OF ADVICE

13. What will clients pay for in the future

As technology automates more technical work and regulation reshapes how support is delivered, firms are rethinking the value of financial advice itself.

This session will explore how advice propositions are evolving, where paraplanners add the greatest value and how firms can differentiate in an increasingly competitive market, including:

- Understanding how client expectations continue to evolve
- Demonstrating value beyond technical advice and investment performance
- Balancing human expertise with digital support
- Differentiating advice propositions in a competitive market
- Defining the future role of paraplanning in delivering client value

14. The expectations of tomorrow's clients

Clients increasingly expect advice to be faster, more personalised and more digitally enabled, while regulation is reshaping how firms deliver support.

This session will explore how advice firms can redesign journeys that balance technology, human expertise and changing consumer expectations, including:

- Responding to changing digital client expectations
- Understanding the role of Targeted Support and simplified advice
- Designing advice journeys around changing consumer behaviour
- Balancing technology with human expertise
- Identifying commercial opportunities created by evolving client needs

INVESTMENT LANDSCAPE

15. Building better portfolios in a changing world

Persistent inflation, geopolitical uncertainty and changing market dynamics are forcing advisers to rethink traditional portfolio construction. Multi-asset investing remains important, but firms are increasingly reassessing diversification, fixed income and alternative assets.

This session will explore how paraplanners can support more resilient portfolio design in an increasingly uncertain investment environment, including:

- Building diversified portfolios in an uncertain market environment
- Rethinking the role of multi-asset investing
- Assessing where alternative assets can add value
- Re-evaluating fixed income within modern portfolios
- Designing portfolios that improve long-term resilience

16. The new fixed income playbook

After more than a decade of exceptionally low interest rates, fixed income has once again become a core component of portfolio construction. But higher yields have also introduced new risks and opportunities that require fresh thinking.

This session will explore how advisers and paraplanners should approach bonds, credit and income generation as part of modern portfolio design, including:

- Understanding the renewed role of bonds in portfolio construction
- Assessing opportunities across credit markets
- Building sustainable income strategies for clients
- Managing interest rate and duration risk
- Integrating fixed income into modern portfolio design