

THURSDAY 17 JUNE – VIRTUALLY

## THE SCHEDULE

(All delegates are invited to choose the roundtables in which they wish to participate. The roundtables are then scheduled in order to facilitate the maximum satisfaction of delegate choices.)

0800-0830	<b>VIRTUAL COFFEE AND NETWORKING</b>	An opportunity to network over “home-made” coffee in small curated groups or pre-scheduled one-to-ones via Zoom rooms. You will have been invited to make your meeting choices and they will be visible in your personalised itinerary. We will ensure you know what to do!	
0830-0845	<b>PRESENTATION</b>	<b>WELCOME - INCORPORATING THE RESULTS OF THE SCENE SETTER RESEARCH</b>	
0845-0910	<b>PRESENTATION</b>	<b>KEYNOTE: New Horizons in Business Culture</b> This session picks out the top trends driving corporate culture. Like the air that we breathe culture can be assumed and invisible to us. But allowing your culture to lag the needs of the time or even descend into becoming toxic is a sign of declining health and must be responded to. Here is an executive summary of the cultural responses needed to be a top performer in the world today. Martin Hill-Wilson, Independent Consultant, <b>Brainfood Consulting</b>	
0915-1015	<b>STRATEGIC ROUNDTABLES</b> <i>Interactivity is the key</i>	Worried that implementing another siloed it system won't meet your company goals to reduce Opex, increase profit, cx or help your advisers save time? We think you could be right. But what is proven to achieve this? It's time to understand the power of utilising digital workers....	The changing adviser platform market
1015-1025	<b>COFFEE</b>	An opportunity for you to catch up on emails – grab a coffee or a “pick yourself up” smoothie – do a HIIT workout. OR stick with us and watch Companies in Motion who will teach you in a ten-minute video how to ‘Power your performance with physical intelligence. Achieve more, stress less, live and work more happily.’ Could prove useful.	
		<b>TechTalks:</b> Short and punchy presentations from our fintech companies to tell you what they do within the space of ten minutes tops. Their brief is to entertain and educate rather than pitch! The clock will be ticking.	
1025-1035	<b>TECHTALK</b>	<b>Five days in five minutes</b> <ul style="list-style-type: none"> <li>A week in the life of an adviser</li> <li>quarterly reports to send out, piles of paperwork to be dealt with, review appointments to book, letters of authority to get signed, new clients to on-board, application forms to send out, valuations to request, client enquiries to respond to, portfolios to review, compliance reports to complete, emails to deal with....</li> <li>Does this all sound familiar? These are just some of the tasks an adviser and their team have to deal with in a typical week. Administrative tasks that leave less time for the most important element of any advice firm - conversations with clients.</li> <li>from quarterly reporting to client reviews, in five minutes tessa lee, managing director at moneyinfo will show you an easier way to do the things you do every day so you can have more time to spend with clients.</li> </ul>	



**EXPERT:** Tessa Lee, Managing Director, **MONEYINFO**

1035-1045	TECHTALK	<p><b>The anatomy of premium wealth experiences: how a calculation engine can empower lasting customer loyalty</b></p> <ul style="list-style-type: none"> <li>The post-covid reality sets a new higher standard for omnichannel wealth experiences, which unlocks all the benefits of digital communication but creates new challenges, both technological and behavioural.</li> <li>Like face-to-face and phone calls, digital wealth journeys must achieve a comfortable balance of relevant and actionable inbound and outbound activity, delivered to the customer whenever and wherever they desire.</li> <li>The “stickiness” of a digital journey is closely aligned with added value, and financial analytics has a central role to play when it comes to creating scalable wealth experiences.</li> </ul> <p><b>EXPERT:</b> Zaliia Gindullina, Head of Business Development, <b>KIDBROOKE</b></p>	
1045-1055	COFFEE	<p><b>Another break to allow you to stretch your legs; watch part 2 of Companies in Motion; clear the inbox or powder your nose!</b></p>	
1055-1155	STRATEGIC ROUNDTABLES <i>Interactivity is the key</i>	<p><b>Are you ready for financial planning in a hybrid world?</b></p>	<p><b>The robots might be coming... but they'd better be ready for a fight</b></p>
1200-1210	TECHTALK	<p><b>In a rising sea of technology, what is the dry land for advisers?</b></p> <ul style="list-style-type: none"> <li>Futurologists have, for the past few decades, confidently predicted the rise of the robot and a time when intelligent machines will take jobs away from humans. That new era has never quite appeared but over the centuries machines have made ever-lasting changes in sectors like agriculture and manufacturing. Now we see technology really starting to impact services and how they are delivered. It is said, ‘a crisis just accelerates the inevitable’ and today’s coronavirus pandemic provides some clues to the direction of travel for technology deployment in Financial Advice.</li> <li>So, what does the future looks like for Wealth Managers and Financial Advisers? Financial institutions are experimenting with the implementation of these technologies with a focus on increasing value for both the consumer and the business. As technology looks to provide more efficient, reliable and repeatable outcomes in key advice areas, let’s take a look at the uniquely human traits that advisers should be anchoring on while the tech does its work.</li> </ul> <p><b>EXPERT:</b> Adam Jones, CTO &amp; MD of ADA, <b>REDINGTON</b></p>	
1210-1235	PRESENTATION	<p><b>KEYNOTE: FLEX!: Reinventing Work for a Smarter, Happier Life</b></p> <p>Annie Auerbach is an expert on the future of work, an author and the co-founder of trends and cultural insight agency Starling, whose clients include Nike, Pepsico and Unilever. Her book FLEX is a revolutionary guide to living and working on your own terms and was featured by Stylist magazine as the best book on working from home. Coronavirus has proven what she has long championed: working 9-5 in an office doesn't work for most us. The world is changing but until the pandemic, companies turned a blind eye. Now, it's time to reinvent the systems that were holding us back.</p> <p>Annie Auerbach, Co-Founder, <b>Starling Strategy</b></p>	
1235-1240		<p><b>THANK YOU AND WAVE GOODBYE!</b></p>	



1700-1745

**MORE VIRTUAL NETWORKING**

**EVENING DRINKS.** They will be provided! A mix of pre-scheduled one to one meetings and ad hoc chit chat!