

PARAPLANNING EXCELLENCE IX

SCHEDULE OF THE DAY

5 NOVEMBER 2019

Schroders' Offices, 1 London Wall Place, Barbican, London EC2Y 5AU

	Theatre A	Theatre B	104	105-106	107-108
	Registration, coffee and buns!				
09.00-09.30	Macro Update <i>Michael Joynton, Invesco</i>				
09.30-10.05	Capturing your clients' (and advisers) attention <i>Grant Leboff, Sticky Marketing</i>				
10.05-11.05		What will the paraplanner role look like in 5 years' time and how much influence will technology have?	Regulation Update- 10 things you should do tomorrow	How to nurture a healthy culture in your business	Delivering a seamless investment journey
11.05-11.20	Coffee and networking				
11.20-12.10		Intergenerational wealth transfer <i>Gillian Hepburn, Schroders</i>	The Energy Transition Opportunity <i>Mark Lacey, Schroders</i>	Risk Targeted <i>David Auijla, Invesco</i>	UK Equities <i>Joanna Smith and Neville Pike, Invesco</i>
12.10-13.00		Intergenerational wealth transfer <i>Gillian Hepburn, Schroders</i>	Sustainable Model Portfolio Service <i>Emilie Shaw, Schroders</i>	Risk Targeted <i>David Auijla, Invesco</i>	Multi Asset Fund <i>Clive Emery , Invesco</i>
13.00-13.40	Hot buffet luncheon - more networking!				
13.40-14.10	Paraplanning, the future of financial advice and the role of advisers <i>Cathi Harrison, Para-Sols</i>				
14.10-15.00		The Energy Transition Opportunity <i>Mark Lacey, Schroders</i>	Sustainable Model Portfolio Service <i>Emilie Shaw, Schroders</i>	UK Equities <i>Joanna Smith and Neville Pike, Invesco</i>	Multi Asset Fund <i>Clive Emery , Invesco</i>
15.00-16.00		What will the paraplanner role look like in 5 years' time and how much influence will technology have?	Regulation Update- 10 things you should do tomorrow	How to nurture a healthy culture in your business	Delivering a seamless investment journey
16.00-16.30	Unescapable Truths <i>Stuart Podmore, Schroders</i>				
16.30-1730	Farewell drinks				