

A Meeting of Minds Winning Advisers

15 October 2020 (Virtual)

THE SCHEDULE OF THE DAY				
0800-0830	Virtual coffee	An opportunity to network over coffee (and homemade croissants – “home” being the key word here) in small curated groups or 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	Presentation	Welcome incorporating the highlights of the Scene Setter research.		
0845-0910	Presentation	The Post-Pandemic Consumer. At the outset of the pandemic strategic forecasters Trajectory published their expectations of how consumer behaviour, values and attitudes will change. They've been monitoring the trends since, including changing perceptions of tech, the digital legacy of lockdown, the death of distance and changing work-life priorities. Tom Johnson will be presenting their findings and helping us get ready for what's still to come.		
The interactive roundtables will take place over Zoom. Trust us – you will feel as at home as if you were at The Grand York!				
0915-1015	Working Session 1	Centralised retirement propositions – the growing need for a decumulation strategy	Behavioural finance – a look at investor decision making suitability and planning under stress	Perspectives on an intergenerational wealth and planning proposition: does one size fit all?
1015-1035	Coffee	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.		
1035-1135	Working Session 2	Centralised retirement propositions – the growing need for a decumulation strategy	How did your company fare? Needs must! The key is what comes next. Personalisation at scale is the name of the game.	How and why has cash become an integral part of the holistic financial planning process, rather than just being a peripheral concern, and how is the cash world likely to evolve in the future
1135-1155	Coffee	Another break to allow you to stretch your legs; watch part 2 of Companies in Motion; clear the inbox or powder your nose!		
1155-1255	Working Session 3	Managing risk in a very challenging economic environment.	How did your company fare? Needs must! The key is what comes next. Personalisation at scale is the name of the game.	Growing your business: Making your business relevant and valuable for the next 10 years - for yourself or for a sale!
1300-1330	Presentation	Handling data remotely is a big issue for the financial services industry. Our speaker will highlight the potential pitfalls of this “new normal”. He will also talk about the potential impact of, dare we say it, Brexit. There is also something called Schrems! Rob Masson, CEO and Founder of the DPO Centre will highlight the lurking dangers.		
BACK TO THE “OFFICE” BEFORE RECONVENING FOR NETWORKING DRINKS AT 1700. Oh go on!!				
1700-1745	Networking	More virtual networking ... with your (own) glass in hand. We will ensure you know what to do!		