

PROGRAMME

08.45-09.15	Platt Room	Registration, coffee and buns				
09.15-09.25	Seligman Theatre	Welcome address from Invesco and Schroders				
09.25-09.50	Seligman Theatre	Opening address				
09.50-10.20	Seligman Theatre	An exceptional political correspondant will provide an overview of all that is super relevant and hot off the press – be it Brexit or the dubious Trump-Putin relationship. He will then field your questions.				
		INDUSTRY WORKSHOPS				
10.20-11.00		<p>How do you set your fee when so much of what you offer your clients is intangible?- In an increasing digital world the value of advice still needs to be demonstrated but how do you do it when clients perceive some of the job is done by an App? Trust, peace of mind, and continuity of relationship are considered the key benefits advisers offer but at what price?</p>	<p>M&A activity- The client journey. When mergers are announced, it is no mystery why customers expect the worst. Bank customers may lose their favourite branch. Frequent travellers dread changes to flight routes and loyalty programs. Cable customers may find their new bill incomprehensible. Well, it's no different in our industry; when companies merge, they embark on seemingly minor changes that can make a big difference to customers, causing even the most loyal to re-evaluate their relationship with the company.</p>	<p>The power within. How do you build exceptional teams through collective intelligence? Let's be honest, we all know the longer employees stay with you the better for the business. But, we always focus on the individual and with 70% of paraplanners working as part of a team, it might be that a team approach is more effective. Recruiting the brightest people does not guarantee the best teams...It takes time, commitment and willing to change behavioural habits to foster collective intelligence in a team.</p>	<p>The future of Advice in the UK- is personal finance going digital? The internet and digital tools are transforming the provision of financial advice. With the rise of the virtual advice market – how do you plug and play into the revolution? Where have we got to with closing the advice gap? Where are the clients of the future and what do they need now? Is building a hybrid digital-advice proposition the solution to deal with four very different generations?</p>	<p>Talking Productivity- How do you cut through the noise? With margins continually being squeezed, it is not surprising that CEOs seek to get the most out of their workforce. However, the successful optimisation of any team will depend on:</p> <ol style="list-style-type: none"> 1-The ability to not only free them from administrative tasks through cost-effective use of technology 2- Knowing and understanding the needs of those in the business, be they advisers or other members of the team, and balance them with the needs of the clients.
11.00-11.20	Platt Room	Morning Coffee				

INVESTMENT BRIEFINGS						
11.20-11.55		What does ESG and sustainable investing mean to the UK investor today?- Belinda Gal, Schroders	Japan Update- Nathan Gibbs, Schroders	Multi Asset- Nick Mustoe, Invesco Perpetual	Emerging market equities- Dean Newman, Invesco Perpetual	Dynamic Planner Fund- Joe Tennant, Schroders
11.55-12.30		What does ESG and sustainable investing mean to the UK investor today?- Belinda Gal, Schroders	Japan Update- Nathan Gibbs, Schroders	Multi Asset- Nick Mustoe, Invesco Perpetual	Emerging market equities- Dean Newman, Invesco Perpetual	TBC- Matt Parlour, Invesco Perpetual
12.30-13.15		Lunch – an opportunity to network				
13.15-13.45	Seligman Theatre	The Investment Platforms Market Study- With Platforms being a market that has seen significant growth in the past five years, with more customers than ever deciding to use a platform to manage their money. Let's have a look at the FCA's proposed remedies to improve competition.				
INVESTMENT BRIEFINGS						
13.45-14.20		What does ESG and sustainable investing mean to the UK investor today?- Belinda Gal, Schroders	Dynamic Planner Fund- Joe Tennant, Schroders	Multi Asset- Nick Mustoe, Invesco Perpetual	Emerging market equities- Dean Newman, Invesco Perpetual	TBC- Matt Parlour, Invesco Perpetual
14.20-14.55		What does ESG and sustainable investing mean to the UK investor today?- Belinda Gal, Schroders	Dynamic Planner Fund- Joe Tennant, Schroders	Multi Asset- Nick Mustoe, Invesco Perpetual	Japan Update- Nathan Gibbs, Schroders	TBC- Matt Parlour, Invesco Perpetual
INDUSTRY WORKSHOPS						
14.55-15.35		How do you set your fee when so much of what you offer your clients is intangible?	M&A activity- The client journey.	The power within. How do you build exceptional teams through collective intelligence?	The future of Advice in the UK- is personal finance going digital?	Talking Productivity - how do you cut through the noise?
15.35-16.00	Seligman Theatre	Closing address				
16.00-17.00	Platt Room	Farewell and an invitation to drinks				