

BREAKFAST BRIEFING

Hosted by **Pacific Asset Management**

Thursday 21 March 2019 at The Clubhouse, Bank, 1 Angel Court, London EC2R 7HJ

THE ITINERARY

0830-0900	Arrival and peer group networking over breakfast
0900-0930	The alpha is in advice Matthew Lamb, Chief Executive Officer of Pacific Asset Management, will provide a welcome and introduction focusing on the state of the market from a business acquisition perspective. This will cover areas such as: <ul style="list-style-type: none">• Closing the gap between investment and advice.• Optimising client and business outcomes through a partnership approach.• How access to flexible growth capital can unlock the next steps for your business.
0930-1000	Common sense investing It is now nearly ten years into the second largest market expansion since WW2. Passive investing has done well but now that the market is shifting, and volatility is returning, Will Bartleet, PAM's CIO, will explain why he thinks it is time for an unbiased and diversified approach, embracing a wide range of investment styles to deliver client returns going forward.
1000-1030	Building solutions for advisers: don't outsource value Ben Sears, Head of UK for PAM, explains how Advisers can use a combination of product, service and style to build modern, scalable solutions. He will demonstrate how Pacific leverage technology to build dedicated online adviser portals alongside custom-built suite of materials to enhance adviser value.
1030-1100	M&A Forum: taking the next steps for your business John Chapman of Orion Consulting, a specialist in IFA M&A, will talk about PAM's strategic acquisition of Chartered Financial Management (UK) Ltd. He will explain how the deal was approached and offer you an insight into recent IFA acquisitions he has been involved with, giving you an opportunity to ask plenty of questions.