

THE FINANCIAL PLANNING CONFERENCE 2020

ONLINE

TUESDAY 13 OCTOBER 2020

BST 13:00 - 17:00 | EDT 08:00 - 12:00 | PDT 05:00 - 09:00 | AWST 20:00 - 00:00

13:00

Opening keynote: Best practice sharing globally



Noel Maye, CEO, Financial Planning Standards Board

There are many advantages of being part of a global community of financial planners. During the pandemic we have been able to share our experiences and support each other during these uncertain times. What can CISI and FPSB do to support you as financial planners and how can we work together to support the public now and into the future?

How to be a fully virtual financial planner

Josh Brown, CEO,
Ritholtz Wealth Management



Hear from a planner who was fully virtual before 2020. What is the model and how does it work? What lessons can we learn and incorporate into our professional practice?

Client experience and F.I.R.E.; Financial Independence, Retire Early

Barney Whiter, AKA The Escape Artist



The Financial Independence, Retire Early movement has been taking the US by storm for some time and has a growing following in the UK. Barney, known as The Escape Artist, retired at 42 from his job as an accountant and now coaches, consults and writes on F.I.R.E. He will share with the audience why they need to know about F.I.R.E. and how it might be incorporated by financial planners into their conversations with clients

Financial abuse, coercion and assessing mental capacity globally

Martin Lines, Business Development
Director, JUST



Identifying and dealing with potential financial abuse and coercion is a very pressing matter. Financial planners are at the forefront of identifying these issues. But what are the common markers for both financial abuse and coercion? How should planners handle the matter if it becomes apparent during a client meeting?

IDD

Hire, train and keep the right people

Lien Luu, CFP™, Senior Lecturer,
Coventry University

Kevin Keller, CEO, CFP Board, USA



Hosts of Adviser Gap Podcast;

James Mousley, Matthews Comfort Financial Planning
and Sean Banks, Premier Companies UK.

How are UK universities playing a role in developing
the next generation of financial planners?

What are young people looking for from the
profession to make it a worthwhile long-term career?
What can we learn from the CFP Board's research on
job analysis and apply to building career paths?

Our panel answer all of this and more.

How financial planning can serve millennials

Kate Holmes CFP™, Founder, Innovating
Advice



An examination of an alternative model for service
provision. Online, low cost life planning, education
and budgeting all turned into a simple proposition
for millennial clients. An opportunity to ask ourselves;
How do we do business better or differently?

The practical impact of ethics when giving financial planning advice to your clients

Julie Seberras MBA, CFP™, Senior Manager,
Wealth Planning Support, TD Wealth



Bringing ethics and practice standards together
has the biggest impact on good client outcomes.
A session with an international CFP™ practitioner
perspective on the practical application of ethics in
the workplace.

ETHICS

Roundtables: Q&A with speakers and sponsors

Couldn't be in two places at the same time or had a burning question you wanted a speaker to answer? This is your chance. Speakers from the stream sessions will participate in an open Q&A session. Join a table with a speaker you'd like to put your questions to and ask away!

TUESDAY 13 OCTOBER 2020 AFTER CONFERENCE PART ONE

17:30

The Online Awards Gala and social soirée

Join us after a short break for a relaxed evening of free networking and to celebrate the achievements of the 2020 Financial Planning Award winners. Black tie optional.

The afterparty

For those who love the social aspect of the conference, an opportunity to stay on and catch up with those you last saw at last year's conference.

WEDNESDAY 14 OCTOBER 2020

BST 09:00 - 13:00 | AWST 16:00 - 20:00 | AEST 18:00 - 22:00

09:00

Best practice sharing globally; a summary of the conference so far

Martin Ruskin CFP™ Chartered FCSI
Paradigm Norton Financial Planning,
Chairman of CISI Financial Planning Forum Committee



Developing good client service standards that are good for your clients and your business

Peter Mancell CFP™, Managing Director
Mancell Financial Group



Financial planning can be a real-life changer for clients if done well. But execution of all aspects is of paramount importance.

Peter will share the tools and strategies he has put in place, with a focus on behavioural psychology, to improve the way they serve clients and demonstrate value.

The one-page financial plan

Stephen Jones, CEO, Cooper Parry Wealth



As technology accelerates the use of tools in the financial planning arena, some have questioned how to best present the outputs from these plans to clients.

The team at Cooper Parry Wealth were one of the first in the world to develop the idea of a one-page financial plan to present to clients. But how do you cut the traditional 60-80-page financial plan down to one and does it work? Do clients like it and how does it help the financial planning advice process?

Understanding financial decision making in retirement

Speakers TBA



A session sharing a research piece with over 2,000 retirees to understand their financial decision-making. Hear the research findings and learn how a range of factors including product knowledge, decision-making style and self-confidence influence the financial product choices of retirees.

What would you do? Discussion and voting on a real financial planner's dilemma

ETHICS

Piers Connolly, Head of Professional Standards, CISI
Financial Planning case study



How your culture can drive the growth in your business

Barry Horner CFP™ Chartered MCSI CEO,
Paradigm Norton Financial Planning



The culture of your business is key in determining your direction of travel. Barry draws on his decades of experience to share his top tips on generating a culture that runs through staff and clients and is a force for good. He will also shed light on how to manage deterioration or changes in culture that can have potentially damaging effects.

Gaining CFP™ certification in the UK; Inside-track, process and tips

Steve Martin CFP™ Chartered MCSI,
Smart Financial



Daniel Morgan CFP™, Berry & Oak

A panel of veteran and newly qualified CFP™ professionals discuss the value of the designation and the process of gaining it. Learn how the CFP™ qualification has transformed the way they give advice. Find out what is involved and what has changed. What you need to do to pass, pitfalls to avoid and how best to prepare. Ask the panel your own burning questions too.

Planning for women

Gugu Sidaki CFP™, Director and Co-founder, Wealth Creed



Gugu will shine a light on the gender biases regarding money and the discrimination women often face from the Financial Services sector in addition to the wider issues plaguing women as a group.

We are invited to examine why and how Financial Planners should prioritize overcoming these inequities.

Finally, Gugu will showcase what Creed Wealth are doing differently for female clients in their business.

Roundtables: Q&A with speakers and sponsors

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Closing keynote:

Speaker TBA

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