

# CISI



CHARTERED INSTITUTE FOR  
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## PARAPLANNER SKILLS DAY

16 JUNE 2026

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09:00 – 09:30	Registration and refreshments
09:30 – 09:40	<b>Welcome address</b> <i>Steven McBurnie, CFP™ APP Chartered FCSI (Financial Planning), RBC Brewin Dolphin</i>
09:40 – 10:00	<b>Winner of the Paraplanner of the year 2025</b> <i>David Cole Dip PFS, Amber River HDA</i> Hear from our Paraplanner of the Year 2025 winner, David Cole, as he shares his journey, ambitions, and passion for the paraplanning profession, and his vision for its future.
10:00 – 10:45	<b>The Mighty Pen: Effective Written Communication with Clients</b> <i>David Swanwick, Dimensional</i> They say the pen is mightier than the sword, and paraplanners play a crucial role in drafting written communications for clients. In this session, David Swanwick will draw on Dimensional's 4S Framework to discuss how each 'S' can enhance your communication and deliver better outcomes for clients.
10:45 – 11:15	Break & networking
11:15– 12:15	<b>Honing your skills by identifying biases</b> <i>Jacqueline Lockie, Lockie Consultants</i> <i>Steven Rowe, Chartered Financial Planner, FPFS, Lucent Financial Planning</i> <i>Steven McBurnie CFP™ APP Chartered FCSI (Financial Planning), RBC Brewin Dolphin</i> This highly interactive session aimed to help paraplanners improve their skills and reflect on the biases we exhibit and see in the workplace. Whether you attend client meetings or not, this session will be both fun and informative packed with useful takeaways. What the session contains: <ol style="list-style-type: none"><li>1. Witness an amusing role play where you can identify the main biases.</li><li>2. Workshop session to run your own mini role plays in teams of two based on discussions you have recently had in the workplace (confidentially of course).</li><li>3. Discussion on findings, difficulties and what you can do about them.</li></ol>
12:15– 12:45	<b>Fireside chat on how to get more involved in client meetings</b> <i>Jacqueline Lockie, Lockie Consultants</i> <i>Steven Rowe, Chartered Financial Planner, FPFS, Lucent Financial Planning</i> Fireside chat where you get to ask out panel questions. We will aim to cover: <ul style="list-style-type: none"><li>• How to get more involved in client meetings (and how to ask to be included if you currently aren't)</li><li>• Pointers on how you can improve your interactions and approach in meetings (so you're not just the technical go-to) but how you can be complimentary to the adviser/planner's approach. How all this enhances the client experience.</li><li>• How to manage post-client meetings with advisers (if you are not in the meetings), how to obtain missing information more easily, recording meetings, meeting notes and more!</li><li>• We will also be answering any other questions that you have about financial planning or your work environment to support you in your fabulous chosen career. Feel free to submit them anonymously if you wish.</li></ul>
12:45 – 13:45	<b>Lunch</b>

	STREAM 1	STREAM 2
13:45 – 14:30	<p><b>AI Safety, Advancements, adoption</b></p> <p><i>Harriet Meyer, AI for media</i></p> <p>The session explores practical applications of AI, common risks, and how professionals can use AI tools responsibly without compromising compliance, data protection, or trust. The emphasis is on clarity, confidence, and real-world judgement.</p> <p>What attendees will learn:</p> <ul style="list-style-type: none"> <li>• Five practical ways AI can support day-to-day work</li> <li>• Three clear principles for using AI safely and responsibly</li> <li>• How to assess AI risks and ethical considerations in real-world contexts</li> <li>• Clear, actionable takeaways attendees can apply immediately</li> </ul>	<p><b>Enhancing Feedback</b></p> <p><i>Melissa Kidd, Motem</i></p> <p>At its best, it can be motivating. At its worst, it can be crushing. We're talking about feedback.</p> <p>We've all probably had some unfair, poorly delivered or badly-timed feedback in our careers.</p> <p>Knowing how to give (and take it) is so essential for high performing teams that we're running a skills session on it...</p> <ul style="list-style-type: none"> <li>• Recognise 2 ingredients which can reduce defensiveness</li> <li>• Use frameworks to structure the message which clearly communicates the helpful or unhelpful behaviour and its impact</li> <li>• Prepare for delivering feedback</li> <li>• Address or uncover resistance to the feedback</li> <li>• Identify 6 tips for taking feedback well</li> </ul>
14:30 – 15:00	Afternoon break	
15:00– 15:45	<p><b>ACT on IHT</b></p> <p><i>Les Cameron, M&amp;G</i></p> <p>IHT receipts are on an ever upwards trajectory and about to take a further boost with pensions coming into the IHT net.</p> <p>In this session we will take a look at the use of various trusts and reliefs in mitigating an IHT liability and why none of them are the answer.</p> <p>The session will be interactive with the audience helping Les to decide what's hot and what's not when it comes to IHT planning.</p>	
15:45 – 16:00	<p><b>Closing remarks</b></p> <p><i>Steven McBurnie, CFP™ APP Chartered FCSI (Financial Planning), RBC Brewin Dolphin</i></p>	
16:00	Conference close	