



Purely Paraplanning

Conference

Exclusively for the Paraplanning Community

Agenda Purely Paraplanning Conference - Bristol

Venue: Double Tree by Hilton, Bristol City Centre, Redcliffe Way, Bristol, BS1 6NJ

Date: Tuesday, 1 September 2015

In association with our Partners in Professionalism:



Please use this CPD recording agenda to record your CPD and take it home with you to upload to your records on the CII CPD Tool. Do not leave this behind.

08:45 - 09:15 Delegate registration

09:15 - 09:30 Welcome and introduction from the chairman
Cathi Harrison

09:30 - 10:20 Sifting fact from fable – the regulatory and compliance debate

Learning objectives:

- To hear from Rory Percival (FCA) and to understand the position of the regulator
- To focus on some of the key regulatory issues of relevance to the key roles of paraplanners – research & analysis, report writing, formulation of recommendations and suitability and platform/provider due diligence – and in so doing provide greater clarity and myth busting
- To provide a forum for panel members to comment on FCA position on suitability and communicate key messages
- An opportunity for interactive Q&A

Mel de Noronha, Outreach Officer, Financial Ombudsman Service (FOS)

Gary Kershaw, Compliance Director, SimplyBiz

Stephen Gazard, Managing Director, Sesame Bankhall Group (SBG)

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

10:20 - 10:40 Technology briefings

Hear from two technology companies about how technology can help you deliver better client outcomes more quickly and efficiently

Gary Savory, Business Development Manager, Distribution Technology

Peter Bradshaw, National Accounts Director, Selectapension

10:40 - 11:00 Coffee break and access to the 'Technology Room'

11:00 - 11:40 Budget planning opportunities

Learning objectives - be able to:

- Understand the relevant Budget proposals that the Government made in their July Budget as regards pensions, dividend taxation and inheritance tax
- Analyse the impact of those changes on clients
- Consider any planning opportunities for clients and advisers as a result of those changes on pension planning, investment planning, remuneration planning and inheritance planning
- Highlight any immediate action that should be considered

John Woolley, Director, Technical Connections

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

11:40 - 12:20

Better paraplanning

Learning objectives:

- To hear from experienced paraplanners in respect of 'best practice'
- To understand how paraplanners might execute their role more effectively

Damian Davies, Director, The Time Bank

Jon Cofield, Paraplanning Manager, Sanlam Wealth Planning

Kat Mock, Senior Paraplanner, The Paraplanners

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

12:20 - 12:40

Technology briefings

Hear from two technology companies about how technology can help you deliver better client outcomes more quickly and efficiently

David Scholes, Business Development Manager, Financial Express

Wendy Dines, Client Transition Consultant, Intelliflo

12:40 - 13:30

Lunch and access to the 'Technology Room'

13:30 - 14:10

Understanding financial decision making by consumers

Learning objectives - be able to:

- Explore how Behavioural Finance can be understood, utilised and undertaken to achieve better client outcomes
- Appreciate the position taken by the regulator and how they are looking to apply Behavioural Finance in practice
- Understand how elements of Behavioural Finance impacts on retirement income planning

John Joe McGinley, Ideas consultant, Glassagh Consulting

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

14:10 - 14:40

Cash flow forecasting and the outlook for annuities

Learning objectives - be able to:

- Recognise key considerations in the shift from 'investment' to 'consumption' frames
- Explain the longevity conundrum
- Balance the key elements of security and flexibility

Karen Lauder, Business Development Manager, Partnership

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

14:40 - 15:00 **Coffee break and access to 'Technology Room'**

15:00 - 15:50 **How to get people to do what you want them to**

Learning objectives - be able to:

- Understand how to get prospects, clients and colleagues to open up
- Know precisely what to listen for
- Understand how to interpret the intelligence you've gleaned

Richard Mullender, Former Lead Trainer, National Crisis & Hostage Negotiation Unit at Scotland Yard

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

15:50 - 16:00 **Chairman's closing remarks**

16:00 - 17:00 **Hobnob, hands on use and Schmooze session**

The Purely Paraplanning Conference provides 4 hours 10 minutes CPD.

The content in each session has been carefully selected and can be considered for both structured and unstructured CPD hours, depending how this activity addressed each individual's personal development needs.

Structured CPD is the undertaking of any formal learning activity designed to meet a specific learning outcome (this is what an individual is expected to know, understand or do as a result of his or her learning).

Unstructured CPD is any activity an individual considers has met a learning outcome, but which may not have been specifically designed to meet their development needs.