



8-9 October

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7 October: Charity Golf Day

11.00 Windlesham Golf Club, Grove End, Bagshot, Surrey GU19 5HY

8 October: Day 1

09:00 - 10:20 Registration

09:30 - 10:15

Breakfast Stream 1 (Hampton Suite)

Getting Copilot to augment your business

Oliver Bourke, Mercury Wealth Management

- Using SharePoint as your central source of knowledge, not just for files
- Getting Copilot to augment your business

Breakfast Stream 2 (Beaumont Room)

Planning for the long game: Why SEND families need you to show up differently

Ali Fanshawe, Co-Founder SENDA| COO

This session will introduce the term special educational needs and disabilities, exploring what it means and how it can affect individuals and families. It will consider why planning for those with special needs differs from traditional financial planning, and the importance of getting it right for families who cannot afford mistakes. It will also highlight that effective planning goes beyond finances, focusing on supporting the development of a longer-term life plan.

10:20

Welcome address

Host : Jeremy Nicholas, Author & Presenter

Tracy Vegro OBE, CISI, CEO

10:25 - 11:20

Opening Keynote – Matthew Dicks – Story telling

Matthew Dicks

Matthew Dicks is an internationally bestselling author, award-winning teacher, and one of the most accomplished storytellers in the world, a 62-time Moth StorySLAM champion and 10-time GrandSLAM winner.

He's not just a storyteller—he's a strategist. For more than a decade, Matt has helped companies like Amazon, Google, and Salesforce. Matt has also consulted with Harvard University and the F.B.I., to unlock the power of stories to drive results. Whether it's a sales pitch, leadership communication, or brand narrative, he helps individuals and teams communicate with clarity, confidence, and connection.

11:30 - 12:30

Breaking through the ceilings: Findings from the latest Global Advisor Study

Peter Wozniak CFA, Regional Director, Practice Management, Dimensional Fund Advisors

When growing their businesses, advice firms can find that they reach certain ceilings which hamper their progress. Breaking through these ceilings requires the right decisions or strategies. In this session, we'll draw on findings from one of the industry's largest benchmarking studies, the Global Advisor Study, to discuss the ways that High-Performing Firms approach fees, growth, human capital and other challenges.

12.35 -13.35

Option 1

Lunch & Networking

Option 2 (Hampton Suite)

One-to-One Drop-In Sessions with the FCA

Option 3 (Beaumont Room)

Q&A with Clarke Willmott - 'Exiting mature trusts'

Jennifer Charlton, Partner, Private Client

13:35 - 14:15	Stream 1 (Hanover Suite) AI research and firm usage <i>Ian McKenna – Financial Technology Research Centre</i> This session explores the rapidly evolving potential of AI and its implications for financial planning firms. While the future remains uncertain, firms that adapt their people, skills, and operating models will be best positioned to succeed. With a practical, real-world focus, it highlights how to retrain and repurpose teams now to drive efficiency and unlock AI's full potential.	Stream 2 (Beaumont Room) Moving in or moving on: financial planning for arrivers, and those contemplating a UK exit <i>David Denton – Head of Technical, Quilter</i> Global mobility is accelerating fast, but are the financial attractions of waving goodbye as straightforward as we would like to believe? We take a look at the essential early planning for the well advised, considering property, pensions and other wealth and relevant tax breaks. Yes, tax breaks. For, despite the dismantling of the 'non-dom' regime by Labour, significant alternative tax-breaks now exist – but for whom, how and why? All will be revealed...	Stream 3 (Hampton Suite) How to attract and convert right-fit clients with ease <i>Beth Fitzgerald – Advise HER</i> A practical session that equips firms with a simple, three-step framework advisors can use to communicate their value clearly and memorably. Advisors learn how to replace generic elevator pitches with a magnetic, client-attracting message that sparks genuine conversations, strengthens referrals, and becomes the foundation of their business development efforts.
14:25 - 15:05	Stream 1 (Hanover Suite) Legal claims: issue-spotting for practitioners <i>Jasmine Ivory, Legal Director, Michelmores Emma Bryson, Senior Associate, Michelmores</i> Financial advisers are often the first to spot the early warning signs of a dispute but recognising when a situation may give rise to a formal legal claim is not always straightforward. This practical session is designed to help advisers identify common "red flags" in contentious trusts and probate matters and in cases involving suspected lifetime financial abuse, so that issues can be addressed early and appropriately. Delivered by experienced solicitors specialising in contested trusts, wills and estates, the session will explore the types of claims that frequently arise following death or during a client's lifetime. The session will also consider scenarios where concerns arise about potential financial exploitation of vulnerable individuals.	Stream 2 (Beaumont Room) Preserving family wealth <i>Andrew Day LLB (hons) FPFS CFP™ Depledge Financial</i> Navigating the great wealth transfer across generations requires careful planning, communication, and strategic thinking to ensure family prosperity endures. Drawing on over 25 years' experience advising families, Andrew shares practical approaches to help clients not just transfer wealth, but to enable families to preserve it. Using research from around the world on some of the wealthiest families and the concept of the '100 year financial plan' the presentation will bring together a number of concepts at the very time that the great generational wealth transfer is taking place. Discover how better planning, earlier conversations and engaging the next generation can strengthen client relationships, demonstrate your value as a planner and safeguard family wealth for generations to come. Leave with practical ideas you can use in your very next client conversation.	Stream 3 (Hampton Suite) The relationship is the work <i>Emma Boardwell, Emotional Finance</i> Financial professionals know that relationships are their differentiator - yet for all the rigour the industry brings to the technical dimension of planning, there is remarkably little attention paid to what exceptional client relationships actually look like, or how to build them by design. Well-intentioned relationships are not the same as well-executed ones. In this session, Emma Boardwell - psychotherapist, financial coach, and founder of Emotional Finance - draws on the one profession that treats the relationship itself as the work, translating insights from psychotherapy into practical tools for building the client relationships that will define the next era of financial advice.
15.05 – 15:30	Refreshment break and networking		
15:30 – 15:50	Global insights in financial planning – FPSB update & CFP professional celebration <i>Dante De Gori CFP, FPSB CEO</i> Celebrating the CFP professional class of 2025		

15:50-16:45

Why do good people do bad things?

Philippa Hann, CEO Paradigm Norton Financial Planning

In this compelling keynote, Philippa Hann explores the hidden fault lines that run beneath every financial organisation and every professional. Drawing on behavioural science, real industry scandals and insights from her forthcoming book *The Fault Lines of Finance*, she reveals why integrity is far more fragile than most of us realise, and what we can do to protect it.

16.45 – 17:30

Buckets, buffers, blankets and other bedtime stories: The folklore of retirement income

Abraham Okusanya CFP APP Chartered MCSI, Founder and CEO, Timeline

Retirement income planning has more than its fair share of folklore.

This session takes a scalpel to the most widely held retirement portfolio strategies in the advice profession: bucketing, cash buffers, and the various comfort blankets advisers reach for when markets get scary. Not because the intentions behind them are wrong, but because the evidence against them is overwhelming.

Drawing on decades of research and historical data, Timeline CEO Abraham Okusanya will show that the strategies most advisers trust most are often the ones that cost clients the most in the long run. The comfort is real. The cost is hidden. And the gap between what feels prudent and what the evidence supports is wider than the profession is willing to admit.

This is not a gentle session. But it is a useful one

17:00 – 19:00

Hotel check in

18:30- 23:45

Awards Ceremony

9 October: Day 2

08:45

Registration and refreshments

Welcome coffee with refreshments

09:00

Welcome address

Jeremy Nicholas (Host)

09:10 - 10:10

Rory Sutherland

Rory Sutherland

Rory Sutherland is a renowned British advertising executive, author, and behavioural science expert serving as Vice Chairman of Ogilvy UK. A former classics teacher, he joined Ogilvy in 1988, later founding its behavioural science practice to apply psychology to marketing. He is known for popularizing the idea that irrational, low-cost solutions often outperform expensive, logical ones.

10.20 -11.00	Stream 1 (Hanover Suite)	Stream 2 (Beaumont Room)	Stream 3 (Hampton Suite)
	IIFPT: The integration premium and why advisors matter <i>Michael Kothakota, Wolfbridge Wealth and Columbia University</i> <i>Steven Rowe, Lucent Financial Planning</i> Financial planners know integration creates value. IIFPT illustrates this this research proves it mathematically. Interdependent Integrative Financial Planning Theory demonstrates that coordinated planning across domains delivers 5.9–13.2% more value than siloed advice, measured in client net worth rather than abstract utility. For a £500,000 client, that's £30k-£66k in quantifiable benefit. The framework shows that the whole is greater than the sum of its parts - but they all need to be coordinated. It's the financial planner that generates that premium. Learn how to claim that value with your clients and be proud of it.	6 steps to heaven (well at least it will feel like it) <i>Marlene J Outtrim CFP™ Chartered FCSI (Financial Planning) MSc (Econ), Chartered Wealth Manager, Managing Director, UNIQ Family Wealth</i> <i>Author of Boomers: Redefining Retirement & Cascading Your Wealth</i> This session looks at the 6 steps which make up the Financial Planning process and how Planners can make it work its magic for clients and themselves. If you have struggled to make the 6-step process part of your proposition or are new to true Financial Planning and want to find out whether it would make a difference, this is for you.	Bad trust, good trust, no trust? <i>Les Cameron, Head of Technical, M&G</i> Ten years on from the Pension Freedoms Budget that transformed the retirement landscape, the Autumn Budget 2024 has brought further change by reshaping the inheritance tax (IHT) landscape. In this session, Les will explore IHT planning in a world where pensions are now within the IHT net, highlighting key considerations and strategies to help manage ever-increasing IHT liabilities.
11.05-11.55	Option 1 (Hanover Suite)	Option 2	
	Workshop: Practical Storytelling for Stronger Client Connections <i>Matthew Dicks</i> This highly interactive workshop gives participants practical storytelling techniques they can begin using immediately with clients, prospects, and colleagues. Through short demonstrations, guided exercises, and partner practice, participants will learn how to identify compelling stories from their own lives, structure them for maximum impact, and use them to build trust, simplify complex financial concepts, and create stronger human connections. Designed specifically for financial professionals operating in an AI-driven world, the workshop emphasizes the communication skills that technology cannot replicate and gives every participant the opportunity to practice and receive immediate feedback.	Refreshment Break and Networking	
11.55 – 12.35	Keynote: The top ten AI tools for financial advisers <i>Heather Murray, Founder and CEO of AI For Non-Techies</i> A practical, jargon-free walkthrough of the AI tools transforming how financial advisers work, from cutting admin time to supercharging client relationships. Heather shares exactly how to use each tool, with real prompts and use cases tailored to the financial services sector.		

12.35 – 13:30 Lunch & Networking

13:30– 14:10	Stream 1 (Hanover Suite)	Stream 2 (Beaumont Room)	Stream 3 (Hampton Suite)
	Benefits of creating a personal brand <i>Phil Bray, Yardstick</i> If the phrase “personal brand” makes you think about personal grooming, social media influencers, or just switches you off completely, this session is for you. Like it or not, we all have a personal brand, so we might as well make ours as strong as possible, helping the right people understand who we are, what we stand for, and why they should trust us. In this talk, I'll explain why a strong personal brand helps you win business, attract opportunities, and stand out in a market where so many financial advisers and planners look the same to their target audience. More importantly, I'll show you how to build a personal brand without making you feel uncomfortable.	Discovery meetings: Four lenses on understanding clients <i>Chair: Nicola Ellis CFP MCSI, Wellington Wealth (Glasgow) Limited</i> <i>Eduardo Ferreira Simoes Chartered MCSI CFP, Harrison Brook</i> <i>Iyanu Amusat CFP Chartered MCSI, Arcrate Asset Management</i> <i>Jay Kumar DipFA CertLTCP PETR AdvDipFA Chartered ALFBF CFP MCSI, True Potential Wealth Management</i> Discovery meetings are at the heart of great financial planning, but there is no single approach that works for every client. In this panel, four CERTIFIED FINANCIAL PLANNER Professionals will explore different lenses on discovery: technology and preparation, life planning and client engagement, behavioural insight and human understanding, and articulating your value. Together, these perspectives highlight how effective discovery goes beyond gathering information. It is about understanding clients, how they make decisions, and helping them recognise the value of professional financial planning.	The Future Planner: Are We Training People for the Profession We're Moving Towards? <i>Rohan Sivajoti, Co-founder, Plannex</i> The financial planning profession has never been more technically capable, but technical expertise alone is no longer enough. As AI, technology and changing client expectations reshape the profession, are we developing the skills that will matter most? This session explores the gap between technical competence and professional excellence, highlighting the communication, behavioural coaching, commercial awareness and relationship-building skills that define successful planners. Drawing on experience training financial professionals, attendees will gain a practical framework for developing future-ready planners who combine technical expertise with the human skills needed to build trust, influence clients and thrive in an increasingly AI-enabled world.
14:15-14:55	Option 1 (Hanover Suite)	Option 2	
	AI for financial advisers: Live Q&A deep dive <i>Heather Murray, Founder and CEO of AI For Non-Techies</i> Got questions? Bring them. This open, interactive session gives financial advisers the chance to dig deeper into AI adoption, whether that's where to start, what to avoid, or how to apply specific tools to your day-to-day practice. No question is too basic.	Networking Break	
15:00 – 16:00	Keynote <i>Jamil Qureshi</i> Performance, behaviour under pressure, and decision-making.		
16:10	Closing remarks <i>Jeremy Nicholas</i>		
16:20	Close		