CISI

CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT

THE FINANCIAL PLANNING CONFERENCE 2024

15-16 October

Old Trafford Cricket Ground, Manchester

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#financialplanning24

14 October: Pre-conference activities

From 11:00 on 14 October 2024
Reddish Vale Golf Club, Southcliffe Rd, Stockport SK5 7EE

18 holes, light lunch and three-course dinner with wine included

15 October: Day 1

09:30 - 10:30

Stream 1

Adapting to leadership transitions within firms

Becca Timmins, Consultant, Coach and Facilitator

The transition of leadership is hard. Balancing the value of experience with the ideas and energy of younger leaders can be complex and often requires careful navigation of conflicting priorities and viewpoints. But if you get the balance right, the potential is huge. In this session, we will explore the potential obstacles to successful transition, lessons learned, and ask what the firms that are getting it right are doing.

Stream 2

Psychology of Financial Planning

Jane Jones CFP™ MCSI, Director, Mackenzie Financial Planning & Director, mfp psychology

By far the greatest component is a client's financial success is the personal element - the client themselves, their behaviour around money, and how the financial planner coaches them to achieve the best outcomes. This session will use psychology to help attendees to understand clients' behaviours, their thoughts and biases, and will provide some tools and techniques that attendees can use every day with clients to help them achieve financial success.

10:00 **Registration**

11:00 - 12:00

Stream 1

A story in four parts: From flunking, to acing, to winning, to judging the CFP

Alasdair Walker FPFS CFP™ Chartered FCSI (Financial Planning), Managing Director, Handford Aitkenhead & Walker

Hear from Alasdair Walker, CFP Professional of the Year 2023, on the journey he took to winning the award, and then to judging it. The journey starts at his first CFP case study submission, and in particular the absolute trouncing it received by the examiner. It continues to a 96% graded third submission and a side-quest into the world of CFP training and strategic planning.

Stream 2

Ethical dilemmas for financial planning

Amrita Bhogal, Professional Standards and Ethics Manager, CISI

12:00 - 13:00 **Lunch**

13:10 - 13:20

Welcome note

Mike Waldron, Consultant and Facilitator

13:20 - 14:20

Opening keynote: Holding your nerve

Dr Jo Salter MBE, First female jet pilot to fly the Panavia Tornado

Jo shattered the glass ceiling as Britain's first female fast jet pilot. Join her as she takes you on a journey of breaking barriers (including the sound barrier), overcoming challenges and disrupting the norm. Jo will inspire you to challenge the status quo, embrace your own potential for greatness and learn how to hold your nerve in our complex world. Don't miss this opportunity to hear from a true trailblazer!

	Stream 1: Pure financial planning	Stream 2: Behavioural finance	Stream 3: Practice management and technical
14:20 - 15:00	**Using financial planning and philanthropy to deepen client loyalty** *Graeme Price, Founder Trustee, Together Charitable Foundation* *Harbi Jama, Head of Development, The London Community Foundation* Philanthropy is more prevalent amongst your clients than you think, providing education and purpose for both individuals and families. Learn how to converse with your clients on a deeper level, identify and classify your philanthropical clients, and gain a greater understanding of the vehicles available to you and how to integrate financial planning into your philanthropy discussion. Don't let your clients outgrow you!	**Lessons in financial chemistry** *Jason Lurie CFP™ Chartered FCSI (Financial Planning), Chartered Wealth Manager, Holland Hahn & Wills* Jason has a wealth of knowledge and experience in advising, which should appeal to both our younger and more senior advisers. During his presentation he will share with you, in an approachable yet insightful way, some of the many 'lessons' he has learnt over the years – from who and how to prospect, sales and communication techniques, how to operate and sell a successful business, mistakes he has made and how you can avoid making them!	**Tax agenda: From transparency to integrity** *Ali Kazimi MCSI, Managing Partner, WTS Hansuke* This session for financial intermediaries will highlight the importance of compliance with tax transparency regimes, clear reporting, and ethical standards. Ali will cover FATCA and CRS, AML and KYC practices, and the UK's criminal facilitation of tax evasion regimes. Collaboration with other institutions and authorities, along with public disclosure of tax strategies, helps build trust and supports fair taxation. This promotes transparency and integrity, fostering a responsible financial environment.
15:00 - 15:30	**Refreshments and networking**		

	Stream 1: Pure financial planning	Stream 2: Behavioural finance	Stream 3: Practice management and technical
15:30 - 16:20	**Framing and documenting verbal advice** *Fraser Jack, The Cyber Collective Australia* The thought-provoking session will focus on the provision of advice and challenge the assumption that advice is provided in writing. We reframe the idea of providing a "document" to "documenting the advice" by recording the conversation. We challenge the thinking of the word "Statement" in our Statement of Advice to not just mean written statement but also include verbal statements. We go deeper into what is meant by providing advice under the legislative framework and what it is to receive advice from the client's point of view. (aka, what would clients consider to be "advice" and how do they remember it). Fraser will be drawing similarities to the UK framework.	**Financial coaching: Bridging the gap between planning and practice** *Simonne Gnessen, Founder, Wise Monkey Financial Coaching* *Julie Greenwood, Head of Adviser Distribution, Octopus Money* Join us for a fireside chat hosted by Amyr Rocha Lima CFP ™ Chartered FCSI (Financial Planning). Simonne will share insights from running a small business training financial coaches and Julie from a national coaching business perspective. We will aim to illuminate the needs that financial coaching addresses and inspire you. Whether you're simply curious or eager to take the first steps in establishing a coaching unit within your business, this session promises valuable takeaways.	**Advanced will and IHT planning** *Lucy Obrey, Partner and Head of Private Client, Higgs & Sons Solicitors* *Nick Moxon, Senior Partner, Higgs & Sons Solicitors* This session will cover the importance of appointing the right executors and trustees, as well as what should be done if all the assets are not in the UK. It will also look at using trusts within wills to bank available tax allowances, create a double-dip structure, provide asset protection for beneficiaries, and add or exclude beneficiaries - and any investment issues with these structures. Finally the session will consider the importance of well drafted letter wishes and the requirements to update the same.

16:20 - 17:00	**Closing keynote: Marketing masterclass** *Samantha Russell, Chief Evangelist, FMG Suite* Samantha will be leading a practical how-to session on maximizing returns on your marketing investments. Her passion is helping financial advisors understand digital marketing strategies and switch their mindset from an "outbound cold sales" to a "warm inbound" approach. The strategies she teaches (including optimal website design, SEO, content marketing, social media and video) have helped thousands of advisors experience significant organic growth and new business over the last five years.
17:00 - 19:00	**Hotel check in and break**
19:00 - 23:00	**Awards reception and dinner** **Event dress code:** Lounge suits and dress to impress. **Book here**

16 October: Day 2

08:45 - 09:30	**Stream 1**	**Stream 2**
	Financial planning week 2025 meeting *Dilwar Hussain, Senior Marketing Manager, CISI* *Jade Mehmet-Ali, Marketing Manager, CISI* Have you wanted to get involved in the UK Financial Planning Week, and not been sure where to start? Join this session for more information about how to take part.	**How to build a £4 million practice: Growing and developing your staff and your business** *Julian Gilbert CFP™ Chartered MCSI, CEO, Wealth Matters* Wealth Matters was established as a one-man band in 1999. The award-winning firm now has 20 staff and is aiming for £10 million turnover per annum by 2030. Join this session to hear Julian's practical tips for growing your business.
09:00 - 09:30	**Refreshments and networking**	
09:30 - 09:35	**Welcome address**	
09.35 - 10.35	**Opening keynote: Optimising interactions with others** *Professor Steve Peters, Consultant Psychiatrist and bestselling author* Back by popular demand! Our highest rated speaker from The Financial Planning Conference 2023 has returned. Steve will provide an overview of the Chimp Mind Management Model with real life examples. He will consider the chemical reactions in our brains and delve in to why a happier brain means better performance. This time Steve will also consider how to optimise interactions with others, including appreciating different mindsets, improving relationships, establishing your troop, and communicating constructively.	
10:35 - 11:00	**Refreshments and networking**	

11:00 - 12:20	**Stream 1: Pure financial planning**	**Stream 2: Behavioural finance**	**Stream 3: Practice management and technical**
	Transforming client relationships: Moving from service to partnership *Steve Martin CFP™ Chartered FCSI (Financial Planning), Chief Executive, Smart Financial Planning* *Damien Rylett, Partner, Saltus* Are you absolutely clear about the types of relationships you want to have with clients and the type of service you want to provide? If you are, do you have the necessary skills? Before working with clients, it is important to work out what you are trying to achieve. You can then ensure you are intentional in everything you do to achieve successful outcomes. This session will help you start that journey.	**11:00 - 11:40 What clients want** *David Jones, Head of UK and Ireland Advisor Group & Vice President, Dimensional* Client wants and needs are varied and complex. So, designing a service proposition that can deliver value across a broad range of clients presents financial planning firms with some interesting challenges. This presentation draws on Dimensional's extensive studies of global adviser businesses and end investors to better appreciate what it is that clients want and use these insights to solve challenges such as growth, business development and the demonstration of value add. **11:40 - 12:20 We Are Brave: Take the fear out of disagreement & critical debate** *Sara Hickman, Director & Principle Consultant, We Are Brave* *Rhiannon Baxter, Director & Principle Consultant, We Are Brave* This session will cover myth busting on disagreement: 'it is possible but it's not comfortable'. Gain practical tools to set up the conversation; take time to think first, think better; be ready to speak up and be clear; and keep moving towards a decision.	**11:00 - 11:40 Financial planning post-McCloud in the public sector pensions world** *John R Reynolds CFP™ Chartered FCSI (Financial Planning), Independent Pension Analyst and Director of Expert Pensions Consulting* John and his team at Expert Pensions Consulting are well-versed in the latest developments affecting the NHS pension scheme and the public sector more broadly. This session is about guiding financial planners through these significant financial planning opportunities in public sector pension planning and ensuring they are best placed to help clients make informed retirement decisions about their NHS (or public sector pension) options. **11:40 - 12:20 AI - what have you done for me lately?** *Alan Smith, CEO, Capital Asset Management* *Rohit Vaish, Co-founder, Saturn* *Amal Jolly, Co-founder, Saturn* You're probably bored of hearing those two letters and are wondering when you'll see the much-promised productivity breakthroughs. Enough of the hype and promises – it's time to learn precisely how to take advantage of the technological tidal wave and secure your success in an uncertain future. Alan will share his experiences and the steps you can take to embrace technology. He'll also share his vision for the future of AI-enabled financial planning as well as his concerns.
12:20 - 13:20	**Lunch**		

13:20 - 14:20	Stream 1: Pure financial planning	Stream 2: Behavioural finance	Stream 3: Practice management and technical
13:20 - 14:20	**Cashflow: What really good looks like** *Adam Leci, Technical Consultant, Truth (Prestwood Software)* Adam will explore best practice for cashflow modelling, framed around some of the common mistakes that even top practitioners may be making. Assisted by two respected and reputable planners who have enhanced their proposition by properly implementing cashflow modelling, Adam will consider some myths about cashflow modelling, both from a provider and planner perspective.	**Working with clients going through a divorce** *Tamsin Caine, Director of Financial Planning, Smart Financial* *Joanne Radcliff, Partner, Hill Dickson* This session will cover how to begin working with clients who are going through a divorce, the pros and cons of working with divorcing clients, and technical areas to concentrate on for working in divorce.	**Getting Microsoft to work for your business** *Oliver Bourke, Managing Director, Mercury Wealth Management* Acting as a foundation and building block for financial success, Microsoft 365 is at the core of many businesses. In this session, Oliver will demonstrate its capabilities that you may not be utilising: Microsoft Planner, Sharepoint, Power BI and Visio. After the demonstration, Oliver will open the floor for knowledge sharing where we invite the audience to talk all things Microsoft. The session is best suited for those from smaller firms.

14:20 - 15:20

Closing keynote: Why optimism is the only realism

Nick Murray, financial services professional, author and keynote speaker

Whenever the force of equity-driven innovation has collided with fearful current events, equities have always won out in the long run. However, the proclivity of investors to miss the long-term upward trend of mainstream equities' values and dividends because of negative current events/trends is human nature. An empathetic advisor can be the solution to breaking out of this pattern, helping investors focus on the encouraging lessons of their entire lives rather than on today's disturbing headlines. Promoting a genuine long-term focus — and making it stick — can be a vital element in the wealth manager's value proposition.

15:20 - 15:30

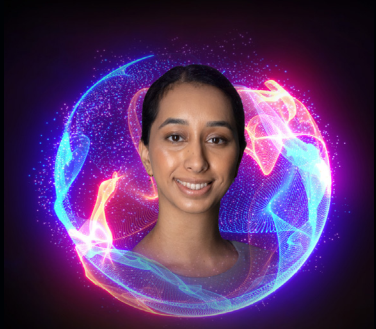
Closing remarks

Speakers

Rhiannon Baxter

Director & Principle Consultant, We Are Brave

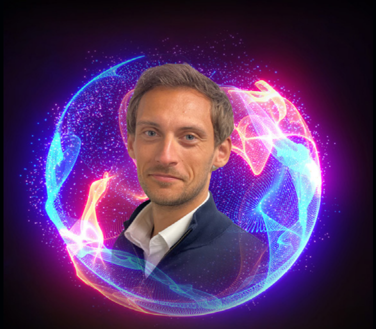
Rhiannon grew up with market traders as parents, had a market stall from a very young age, and used to buy items with the money she made. Strong female leaders who saw potential in underdogs inspired her in her early working years. They allowed her to embrace a rebellious spirit, advocating for change and improvement.



Amrita Bhogal

Professional Standards & Ethics Manager

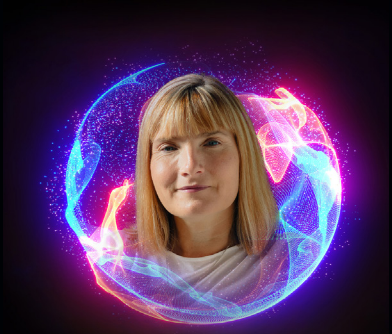
Amrita focuses on raising awareness, standards and understanding of working with integrity in financial services through the CISI's various initiatives. Prior to the CISI, Amrita worked as an Ethics Communication Specialist at the Chartered Institute of Management Accountants (CIMA), delivering on projects to improve communication and understanding of their code of ethics.



Oliver Bourke CFP™ MCSI

Managing Director, Mercury Wealth Management

Oliver spends time with his team, which he is privileged to lead, shaping the strategy of the business for the next generation. As someone who likes to challenge the status quo, he finds himself seeking the latest and greatest tech innovations from around the world in the financial planning space.



Tamsin Caine

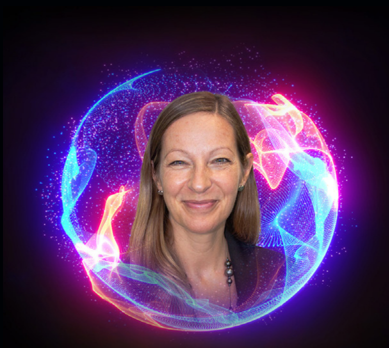
Director of Financial Planning, Smart Financial

Tamsin hosts The Smart Divorce Podcast and co-authored "Your Divorce Handbook: It's What You Do Next That Counts". She is a Resolution Accredited Financial Planner, one of less than 40 in England and Wales and, last year, won the Resolution Collaboration Award and Financial Adviser of the Year – North West. She is a founding co-chair of the Resolution Working Together committee, a member of the Greater Manchester Resolution committee and the Pensions Advisory Group. She is a single mum to Charlie and Zoe and manager of Sale Vikings rugby team.

Julian Gilbert CFP™ Chartered MCSI

CEO, Wealth Matters

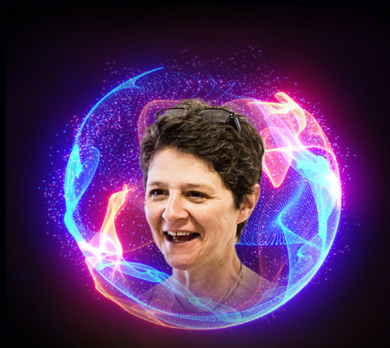
Julian established Wealth Matters in 1999 and became a fee-based financial planner in 2005. After obtaining the CFP™ certification in 2009 it became a goal to nurture and develop highly qualified staff. Wealth Matters is now one of the most highly qualified firms in the UK and has won numerous awards. In 2020, Wealth Matters set up its own trust and wills company. From humble beginnings as a one-man band, the firm has expanded to 20 staff and is aiming to grow to £10 million turnover per annum by 2030.



Julie Greenwood

Head of Adviser Distribution
Octopus Money

Passionate about ensuring people can access the help and advice they need with their finances, Julie joined Octopus Money in June 2024. With over 25 years' experience in financial services, her career spans senior distribution roles across major providers including Octopus Investments, Vitality, Legal & General, Aegon and Standard Life. Julie lives in Lancashire with her partner and their 4 dogs, and is a volunteer for Rochdale Dog Rescue, supporting dogs in finding their forever homes.



Simonne Gnessen

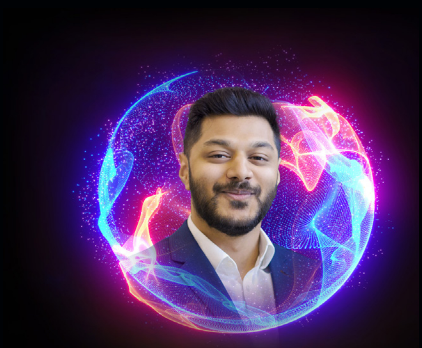
Wise Monkey Financial Coaching

Simonne pioneered financial coaching in the UK. Originally an IFA, Simonne broke away 21 years ago to start her own financial coaching practice and help clients build a better relationship with money. She has been described as a 'holistic financial coach who can crunch numbers, while also getting under the hood and doing deep work'. As well as her client work, Simonne trains others to create their own financial coaching practice. Her work has been featured on BBC radio and TV, and in national newspapers and magazines. She co-authored 'Sheconomics'.

Sara Hickman

Principal Consultant & Owner,
We Are BRAVE

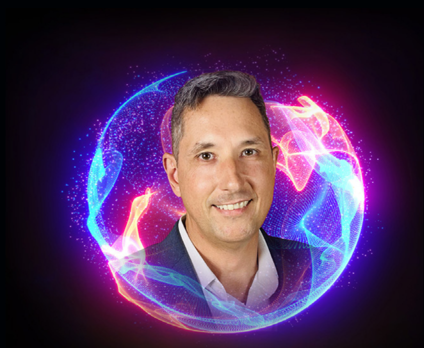
Sara constantly moved countries, locations, and schools, so finding a sense of self was hard. She became adaptable but felt like she was always the outsider for having the 'wrong' accent and not knowing the local music or culture. Experiences like this taught her that outsiders need to be heard as they often don't speak up and usually have the most interesting perspectives.



Dilwar Hussain

Senior Marketing Manager, CISI

Dilwar is a seasoned strategic and creative marketer, leading a talented team that consistently delivers outstanding global marketing campaigns. Since joining the CISI Marketing & Communications Team in 2015, Dilwar has passionately driven fresh and innovative campaigns that continually push the boundaries of marketing excellence.



Fraser Jack

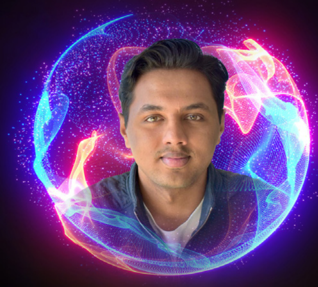
Founder, The Cyber Collective Australia

Fraser is on a mission to make sure every client in Australia can trust that their financial professionals are safely protecting their confidential information, and he would love you to join him. Having run a financial planning practice and working in and around the profession for over 20 years as a technology specialist, Fraser understands the reasonable steps professionals need to take to protect their client data.

Harbi Jama

Director of Development and Communications, The London Community Foundation

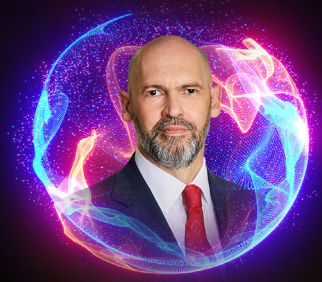
Harbi is enthusiastic about organisational growth and people and supports organisations by creating diverse income streams. He has a vast knowledge of supporting companies and donors in achieving their social impact goals. These include Bank of New York Mellon, Bank of Ireland UK, Deutsche Bank, and S&P Global Foundation. At The London Community FoundationHarbi is responsible for securing income alongside engaging with donors. Harbi is also a Trustee for the Association of Visitors to Immigration Detainees and The Public Law Project.



Amal Jolly

Co-founder, Saturn

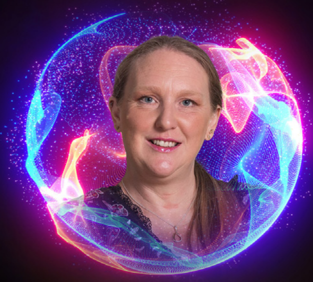
Amal is an experienced banking, wealthtech, and regtech professional. He has built solutions that improve process efficiency and growth in the financial services sector for top-tier financial advisers and fintechs as a tech operator.



David Jones

Head of UK and Ireland Advisor Group & Vice President, Dimensional

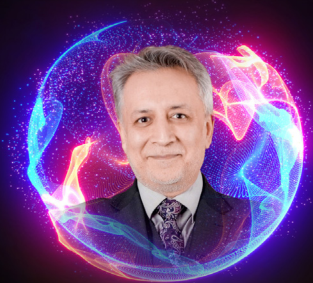
David leads the team of regional directors that support Dimensional's financial adviser clients in the UK and Ireland, as well as heading up the firm's strategic relationships. He has over 30 years of financial services experience. Prior to joining Dimensional in 2009, David was the managing director of his own financial planning practice, specialising in retirement planning and investment advice for corporate and private clients. David holds Master Licenced Trainer designations in mind mapping, memory skills, speed reading and applied innovation.



Jane Jones CFP™ MCSI

Director, Mackenzie Financial Planning & Director, mfp psychology

Based in Bury, Jane is owner-director at Mackenzie and provides a holistic financial planning service to business owners in the north west, primarily as they approach and move through retirement. Jane also runs mfp psychology, helping financial planners understand client behaviours through an evidence-based psychology lens, and providing a toolkit of techniques that they can use every day with clients to help them achieve financial success. After becoming one of the first Psychology of Financial Planning Specialists in the UK, Jane has recently commenced study of a Masters in Psychology.



Ali Kazimi MCSI

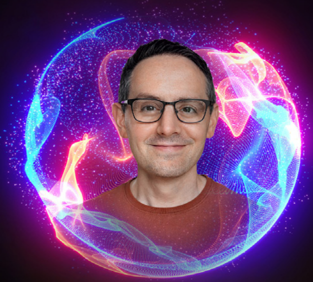
Managing Partner, WTS Hansuke

Ali leads the service team and firms on tax, regulatory, and governance matters.

With over 25 years of experience in the financial services industry, he has held leadership roles such as Head of Tax at Barclays Global Investors and BlackRock, and International Partner at Deloitte UK and Middle East.

Ali is a Chartered Accountant and an expert investment tax, having developed in-house tax policies and technical interpretations.

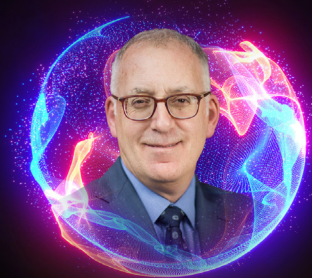
He co-hosts the "Tax Files" podcast, speaks at conferences, and contributes to tax publications on topics including QI, AEoI (FATCA, CDOT, and CRS), securities lending, sovereign fund investing, and more.



Adam Leci

Technical Consultant, Prestwood Software

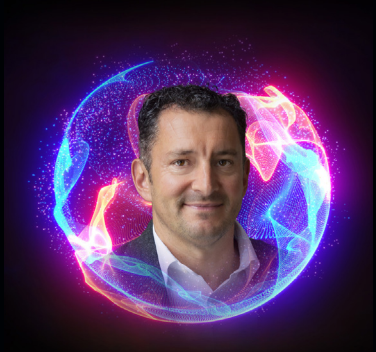
Adam is evangelical about proper, goal-based financial planning, framed around consumer outcomes and facilitated by cashflow modelling. He studied at Oxford and worked as an analyst for the Ministry of Defence before joining Prestwood in 2010. Since then, Adam has helped thousands of planners deliver fantastic outcomes for their clients. He supports new customers implementing cashflow modelling into their businesses and advises on best practice. His blogs and articles are regularly featured in industry publications and he has featured as a guest speaker on a wide range of educational topics.



Jason Lurie CFP™ Chartered FCSI (Financial Planning)

Chartered Wealth Manager, Holland Hahn & Wills

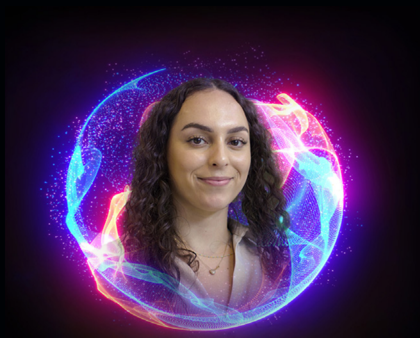
Jason started advising clients in 1983. He joined Holland Hahn & Wills in 2000 and became a full partner in 2003. He specialises in pensions, cash flow forecasting, group and employee benefits, estate planning and bereavement financial planning. Jason's school days were spent at Carmel College in Wallingford, then Kingston College. He graduated from the University of Surrey with a first class honours degree in chemistry in 1983.



Steve Martin CFP™
Chartered FCSI (Financial Planning)

CEO, Smart Financial

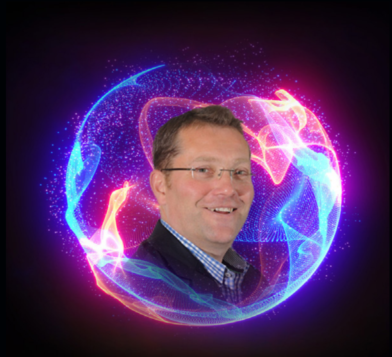
Steve, based in Spain, is also a Chartered Wealth Manager. He is dedicated to providing top-notch financial planning and business consulting services, catering specifically to business owners. He has appeared in The Times and BBC Radio sharing insights on finance, business planning, and effective communication. In addition to his professional achievements, Steve is a passionate athlete, triathlete and gymnastics coach who swears by the motto 'healthy body, healthy mind'.



Jade Mehmet-Ali ACIM

Marketing Manager, CISI

Jade is an experienced marketeer and focuses on aligning marketing strategy to key business objectives, and leverages a breadth of knowledge, tactics and innovative approaches to reach goals. Beyond marketing expertise, Jade is passionate about DEI, and Co-Chairs the CISI's Diversity, Equity and Inclusion Working Group, actively promoting these values.



Nick Moxon

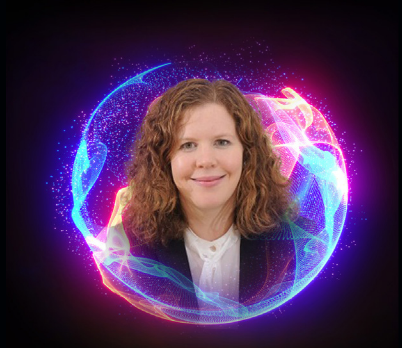
Senior Partner, Higgs & Sons

Nick is a partner in the private client department, having been a partner since 2000. Nick has over 25 years of experience of all aspects of wealth and succession planning matters. He advises both individuals and families on their succession requirements, which are often achieved using a combination of wills, trust structures, family charters and family investment companies. He is a director of the firm's trust corporation, and often leads on estate administration instructions having formed a long-term relationship with the family.

Nick Murray (via video link)

Financial services professional, writer & speaker

Nick has been a financial services professional for over 50 years. He is among the industry's most respected writers and speakers. Nick has written a number of books for financial advisors, the latest of which is 'Nick Murray's Scripts: What to Say and How to Say It'. His one book for investors, 'Simple Wealth, Inevitable Wealth', has sold well over a quarter of a million copies. His monthly newsletter, 'Nick Murray Interactive', is avidly followed by the most accomplished financial advisors all over the English-speaking world.



Lucy Obrey

Partner and Head of Private Client, Higgs & Sons

Lucy leads the private client department and the wealth preservation team at Higgs, having been a partner since 2005. She advises individuals and families on their succession requirements, which are often achieved via a combination of the preparation of wills, trust structures, family charters and family investment companies. Lucy is a director of the firm's trust corporation, and often leads on estate administration instructions. She is a member of the Society of Trust and Estate Practitioners and Solicitors for the Elderly.

Professor Steve Peters

Consultant Psychiatrist, Author & CEO, Chimp Managament

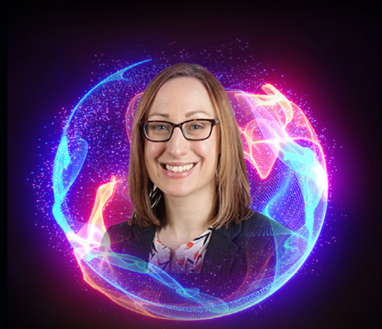
Steve is a medical doctor; he specialises in mental health and the functioning of the human mind. He has dedicated his working life to help people get the best out of themselves. He has worked with over 20 Olympic and national sporting teams, including Liverpool FC and British Cycling, as well as CEOs, executives, teachers, students, hospital staff and patients.

Steve's latest book 'A Path through the Jungle' was published in 2021. He has authored three other books including the bestselling self-help book of all time in the UK, 'The Chimp Paradox'.

Graeme Price

Founder Trustee, Together Charitable Foundation

Graeme is a qualified financial planner and the chair of Jarrovian Group. In a long and varied career he has championed the use of financial planning to enhance the impact of client's philanthropy. He was one of the founder trustees of the Together Charitable Foundation, a donor fund designed by financial planners solely for the use of financial planners and their clients. He remains involved in the provision of philanthropic advice for several financial planning companies, along with lobbying to promote financial education around philanthropy and increase access to appropriate vehicles.



Joanne Radcliff

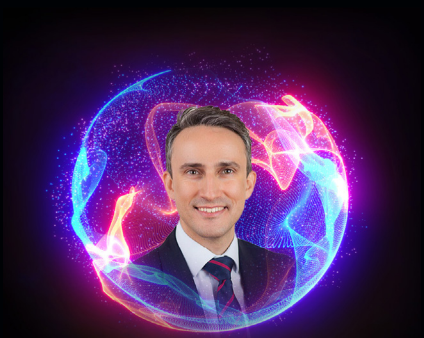
Partner, Hill Dickson

Joanne has over 15 years' experience in family law and has become a 'go to' lawyer for anyone seeking wealth protection via pre-nuptial or post-nuptial agreements. She is a specialist in complex divorce cases. She acts for a variety of business owners, entrepreneurs, sportspeople, professionals, and wealthy families. She also has considerable expertise representing the more financially vulnerable spouse, and can advise on the option of injunctive relief where there is a concern that assets may be purposely placed out of reach in a divorce.

John Reynolds CFP™ Chartered FCSI (Financial Planning)

Director, Expert Pensions Consulting

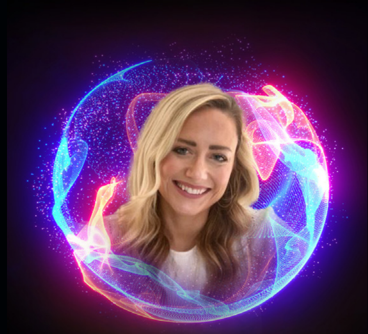
John has 30 years of experience in financial services education, specialising in pensions and investments. He combines teaching, consulting and coaching to demystify complex financial topics for a broad audience. His direct and Feynman-like style of explaining intricate subjects has made him a sought-after consultant for corporate businesses, financial planners and direct clients. His services include consultancy, mentoring, and tailored training programs that address specific pensions, financial planning or client projects.



Amyr Rocha Lima CFP™ Chartered FCSI (Financial Planning)

Director, Strategic Wealth Partners

Amyr helps business owners and senior professionals with their retirement planning. He is also a frequent commentator on financial planning and wealth management matters for both national and specialist media. Amyr is a Non-Executive Director of the CISI and chairs the CISI's Financial Planning Forum - working with over 7,800 members to champion the financial planning profession in the UK. Originally from Brazil, Amyr has lived and studied around the globe, including in Australia, the USA and the UK. He is a graduate of Bayes Business School.



Samantha Russell

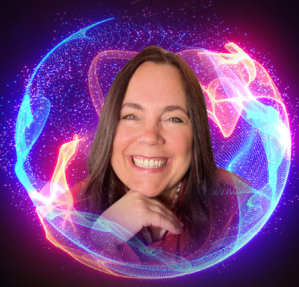
Chief Evangelist, FMG Suite

Samantha is a prolific speaker and content contributor who teaches financial advisers how to utilise digital marketing strategies to produce exponential growth through website development, content marketing, SEO, video and social media. Her cutting-edge thought leadership is recognised throughout the financial services industry and has earned her recognition from InvestmentNews 40 Under 40, ThinkAdvisor Luminaries Class of 2021, and WealthManagement.com's '10 to Watch'.

Damien Rylett

Partner, Saltus

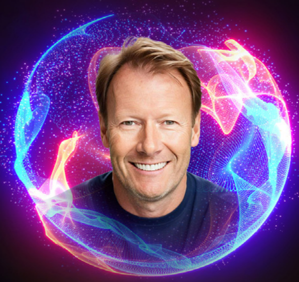
As a business owner, qualified business coach, and mentor, Damien possesses the expertise needed to guide clients through life transitions and ensure families can achieve their ideal lifestyles. He has established two financial planning firms over his 25-year tenure in the profession, including Brunel Capital Partners and the Financial Planning Training Academy. Identifying, nurturing, and developing talent is important to him, and he is actively working to ensure the next generation of financial planners is well-equipped.



Dr Jo Salter MBE

First female jet pilot to fly the Panavia Tornado & Director of Global Transformative Leadership, PWC

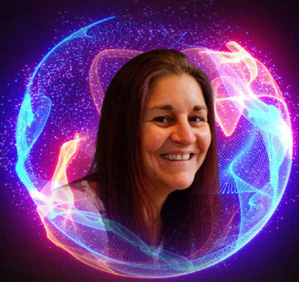
Aged 18, Jo joined the Royal Air Force and began studying at the Royal Military College of Science. Initially passionate to become an engineering officer, Jo made a u-turn when it was announced that women would be allowed to pilot jet aircraft. In 1992, Jo earned her wings and completed her fast jet training the same year. Since leaving the military, Jo has established a strong business career working in senior roles at NetConnect, Automated Power Exchange and Saltin Ltd, as well as speaking on her time in the skies.



Alan Smith

CEO, Capital Asset Management

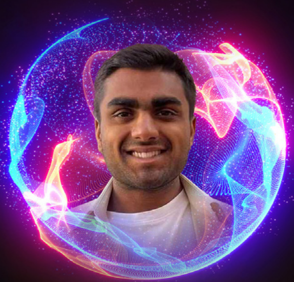
From its origins as a small, transaction-based IFA, Alan and his team have grown Capital Partners into a modern, profitable boutique firm, delivering lifestyle financial planning services to a growing client base of affluent families. Capital has developed a reputation for innovation and thought leadership in wealth management and has won numerous industry accolades, including the prestigious CISI David Norton Building Excellence Award. Alan is also a co-host of TRAP—The Real Adviser Podcast and his own podcast, Bulletproof Entrepreneur.



Becca Timmins

Consultant, Coach and Facilitator

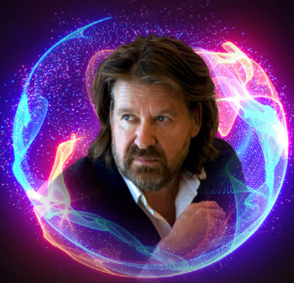
Becca has had a long career in financial planning, starting as a paraplanner. She was part of the leadership team who effected a management buyout (MBO) in 2021, which saw business ownership move from the founder to his daughter as she became CEO. She now works with business owners and leaders supporting them to realise their potential and that of their teams and clients. Her work is grounded in the Thinking Environment™, focusing on relationships and listening skills.



Rohit Vaish

Co-founder, Saturn

Rohit is an operations, product, and team-building specialist with a deep understanding of the financial sector and its regulatory challenges. He has extensive experience with a top ten global asset manager and has built technology products and commercialised them in various industries, including fintech and edtech.



Mike Waldron

Consultant & Facilitator

Mike has global experience of designing, developing and implementing inter-cultural, social leadership and capacity building programmes. He is also experienced in developing academic curricula around design thinking. He has ten years' experience in government, focused on policy development and delivery of social programmes in communities and the advancement of the diversity and inclusion agenda. Mike has worked for, and with, a wide range of organisations including UK and overseas governments, Channel 4, the British Council and The Council of Europe. His passion is people and helping others connect.

Alasdair Walker CFP™ Chartered FCSI (Financial Planning)

Managing Director, Handford Aitkenhead & Walker

Alasdair joined the Financial Planning profession in 2011 and is managing director of HA&W, a boutique financial planning practice in rural Leicestershire. He is an award-winning Certified Financial Planner™ of the Chartered Institute for Securities & Investment.

Alasdair is also a massive geek. Whether about coffee, cycling, technology, or myriad other topics.