6 October 2020

Intergen 2020

Agenda

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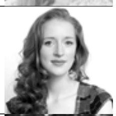
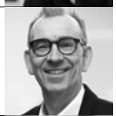
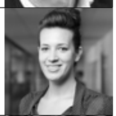
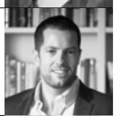
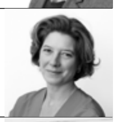
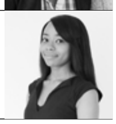
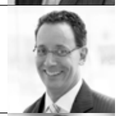
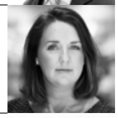
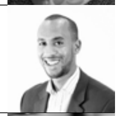
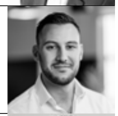
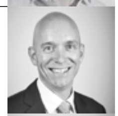
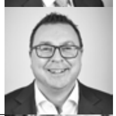
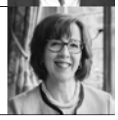
KEYNOTE SPEECHES

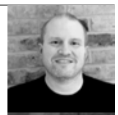
Advising Family businesses on succession planning: The process of getting ready for it and preparing the next generation	Elisabeth Bagger Institute for Family Business	
Successfully promoting your practice to younger investors and catering to their needs	Iona Bain Young Money	
How retail financial services as a whole can adapt to better meet evolving financial needs	Sheldon Mills FCA	
Using ESG to grow a sustainable advice business and to create intergenerational opportunities	Taylor Beavis, Universe Financial Advice and Trusted Adviser Magazine	
The future reputational and commercial opportunities of increasing LGBT equality and engagement	Matthew Cameron LGBT Great	
The future of wealth management and the new generation of advisory business	Nils Elmark Incepcion Ltd	
Intergenerational financial vulnerability, mental ill-health and the foreseeable impact of economic downturn/Covid-19	Tim Farmer TSF Consultants	
Setting the scene on intergenerational differences	Dr Eliza Filby	
Financial education, getting it right and what's at stake	Robert Gardner St James's Place	
The next generation of senior lawyers: Building your practice and attracting clients	Barbara Geerdink Ince	
Advising Family businesses across the generations, from 81 to 21	Russell Haworth The Family Business Partnership	
Keeping your tech relevant for today's clients and tomorrow's	Heather Hopkins Next Wealth	
The evolution of multidisciplinary practices in the context of the regulatory playing field	Peter James ICAEW	
Compassionate communication in professional services	Rebecca Mander Guru You	
Nurturing diversity in the next generation of talent	Monique Malcolm-Hay PwC	

The intergenerational and international reach of family businesses and how this can be managed by the average UK centric adviser	Ken McCracken Family Business Consultant	
Technology and disruption: Do you want to be a Netflix or a Blockbuster?	David Moloney PwC	
Tackling the increasing regulations associated with intersecting with financial advice: staying compliant for current and future generations	Gillian Roche-Saunders Adempi Associates	
The changing face of accountancy and the need to add value to services	Aaron Townsend Habito and Next Gen Accountants	
More money doesn't always mean more impact - How smaller amounts can make an impact and satisfy new gen demand for social and sustainable investment	Jake Wombwell-Povey Attis Ventures	
The past, present and future of due diligence for financial advisers	Alan Sheehan MICAP	
Estate planning and the intergenerational opportunity	Nick Bird Octopus Investments	
	Matt Johnson Octopus Investments	
Divorce finances: Helping women make informed financial decisions	Mary Waring Wealth for Women Ltd	

FIRESIDE CHATS

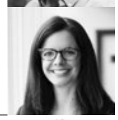
Money and wellbeing - how wealth and happiness are related, how that relationship can be enhanced now and for future generations

Erik Porter (Moderator)
Cheddr



Chris Budd
Initiative for Financial Wellbeing

Sarah Porretta
Money and Pensions Service

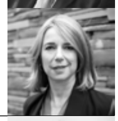


Business continuity - passing it on in the family vs transitioning to an existing management team

Russell Haworth (Moderator)
The Family Business Partnership

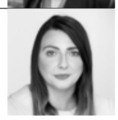
Mike Kane
Turcan Connell

Mairi Mickell
Mairi Mickel's Business Families



The legalities and realities of estate planning advice for blended families, a growing trend

Charlotte Coyle
Goodman Derrick LLP



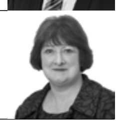
Lilly Whale
Goodman Derrick LLP

Interacting with estate administration to safeguard estate planning and engage with beneficiaries

Paul Mounce
Gosschalks

How has Covid-19 affected intergenerational financial advice and planning?

Kay Ingram
LEBC



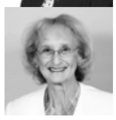
EXPERT PANNELS

What are the intergenerational differences and what do they mean?

Dr. Jonathan Cribb (Moderator)
Institute for Fiscal Studies

Elisabeth Bremner
CMS Law

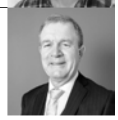
Baroness Sally Greengross
The International Longevity Centre & Crossbench Peer



David Kingman
The Intergenerational Foundation

Adding purpose to investment performance: Recognising and responding to increasing demands for ESG & Impact Investing, the regulatory and compliance practicalities

Jeffrey Mushens (Moderator)
TISA



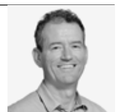
James Dickens
Grierson Dickens

Julia Dreblow
Investment Stewardship & ESG

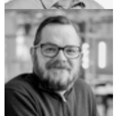
Deborah Gilshan
Independent Advisor, Investment Stewardship & ESG

Can we make professional advice more inclusive to meet the needs of low value and non-standard clients?

Andrew Firth (Moderator)
Wealth Wizards

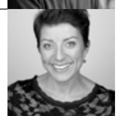


Anthony Morrow
OpenMoney



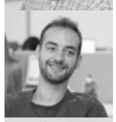
The rise and rise of paraplanners; What next? Retaining expertise or growing the next generation of advisers?

Michelle Hoskin (Moderator)
Standards International

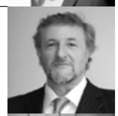
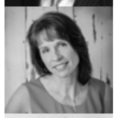
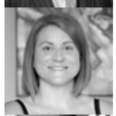
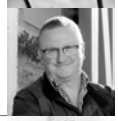
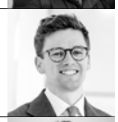
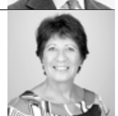
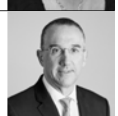
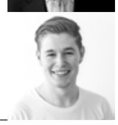
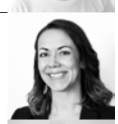
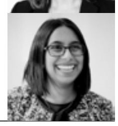


Dan Atkinson
Pardigm Norton

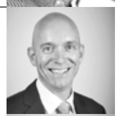
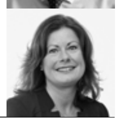
Grant Callaghan
Para-Sols



Richard Ley
Research in Finance

Adding purpose to investment performance: The wider picture and why it matters to upcoming generations	Ray Dhirani WWF	
	Whitni Thomas Triodos Bank	
	Dr Gabrielle Walker	
The future of professional collaboration	John Gaskell ICAEW	
	Denese Molyneux STEP	
	Dave Seager SIFA Professional	
	Rod Smith Royds Withy King LLP	
Supplementing your industry expertise with AI-based robo advice and fintech platforms to meet and exceed client demands	Ian Mckenna Financial Technology Research Centre	
	Kate Birch-Barry The Timelineapp	
	Mark Polson The Langcat	
Business succession planning for the clients of legal and accountancy firms	Tim Williams Burges-Salmon	
Managing the impact of longer life expectancy and increasingly complex family structures on financial planning	Marlene Outrim (Moderator) Uniqu Family Wealth	
	Jenny Pierce Wards	
Building a diverse and inclusive workplace with a positive culture that is open to innovation and attracts a wider client base	Mark Walley STEP	
Intergenerational relationships, insights and engagement: Winning the generation game	Lord David Willetts Resolution Foundation	
	Jack Parsons The Youth Group	
What financial planning holds for the next generation of financial planners and advisers	Natalie Wright Mazars	
	Farida Hassanali Paradigm Norton	

WORKSHOPS

Why and how better soft skills can produce better engagement, retention and understanding	Bernie de Souza	
Integrating considered care planning products into your clients' wealth planning strategy	Tish Hanifan SOLLA	
Navigating the Dynamics of Intergenerational Wealth Planning including understanding how our relationship with money plays out in the family dynamic	Dennis Harhalakis Cambridge Money Coaching	
Practical ideas for engaging with your clients' beneficiaries	Nick Bird Octopus Investments	
	Matt Johnson Octopus Investments	
ESG: Mind the Gap	Jason Williams Blackfinch	
	Sarah Hendy Blackfinch	

CLINICS

Lifetime mortgages - why, when and how?

Staying compliant in shifting realities

Making life easier - back office technology for advisers

Getting it right when a power of attorney is in place

What to watch out for with wills

Optimising how you use your back office systems

Paraplanning pointers

Platform support - iron out your bugbears

Insurance and protection - making it work for clients

Avoiding straying into tax avoidance

Using offshore bonds

Tax technicalities and developments

Advisory services for accountants: delivering business insights

File reviews - getting it right

File reviews - getting it right