Programme

		CPD (Gap-Fill)
08:45+	**Registration & networking breakfast** An opportunity for delegates to network and enjoy a light breakfast buffet.	
09:25	**Welcome** **Nick Cann CFP^{CM},** Chief Executive, IFP	
09:30	**SESSION ONE: The journey to true Financial Planning** **Malcolm F. Murray,** Transact The 'Financial Planning Express' left the station in 1987 when products offering a fund based recurring income were first introduced. Significant progress has been made since then, and not just in terms of adviser remuneration. Malcolm will discuss why Financial Planning is the inevitable destination at the end of the journey, including a look at intergenerational planning, which adds significant value for clients.	PM
10:00	**SESSION TWO: Assumptions for Financial Planning** **Robert Lockie FIFP, CFP^{CM}, Bloomsbury** The presentation will address the assumptions required to meet the CFP^{CM} certification standards and how they can be derived from available data, as well as considering what other assumptions may be required in particular circumstances.	TECH (IFP 114) (IFP 162) (IFP 262)
10:40	**Refreshment break**	
11:05	**SESSION THREE: Cash flow planning - bringing money to life** **Richard Allum CFP^{CM}, Paraplan Plus & MoneyScope** Real Financial Planning means getting to grips with cash flow forecasting. Richard will highlight the powerful benefits it can bring to your business and your clients who will love it! The session will cover: • What information is needed before starting • Making assumptions • Scenario planning and "what ifs" • Cash flows as part of the risk profiling process • Overview of software available (paid for and free)	TECH
11:45	**SESSION FOUR: The Financial Planning jigsaw puzzle** **Tina Weeks, Serenity Life Planning** Tina believes that life planning is just one piece of the Financial Planning jigsaw puzzle. A number of complementary elements are required to put together a successful Financial Planning firm and a proposition which clients really value. Tina will talk about her journey 'step by step' and the mistakes and successes she has experienced in putting together her Financial Planning jigsaw puzzle.	PM
12:25	**Lunch**	
13:25	**SESSION FIVE: Alone we can do so little; together we can do so much - how dynamic the Financial Planner and Paraplanner can be** **Louise Oliver CFP^{CM} & Claire Goodwin, Taylor Oliver Partnership** This session highlights how the overall client experience is enhanced as a result of Paraplanner involvement and how this can improve the service you provide for your clients. Louise and Claire will explore key areas of the process as well as demonstrating how this allows the Financial Planner to focus more effectively on the client's aspirations and objectives.	PM

14:05	**<u>SESSION SIX: Building greater levels of trust & engagement with clients</u>** **Shane Mullins, Fiscal Engineers Ltd** Shane will share insights from some of the most valuable lessons he's learned in developing and maintaining deep and enduring relationships with his clients. The session will focus on how to build greater levels of trust and engagement through adopting a partnership approach to service within firms.	PSC
14:45	**Refreshment break**	
15:10	**<u>SESSION SEVEN: Creating profitable Financial Planning relationships not transactional relationships</u>** **Paul Armson, Inspiring Advisers** In this session Paul will discuss how to ensure clients really 'GET' Financial Planning by taking the focus OFF the money, and putting it where it belongs, on the client. He will also show how to avoid falling into the 'transaction trap' which prevents many advisers from moving towards a genuine Financial Planning model.	PSC
15:50	**<u>SESSION EIGHT: Coaching to confidence</u>** **John Neal** John will look at the ways in which you can build the confidence in others through the application of a coaching approach relying on behavioural skills more than features and benefits.	PD
16:30	**Conference close**	

This event is accredited with 5 hours and 45 minutes of CPD.