



## i-CONFERENCE 2013

Staverton Park, Daventry, 25 and 26 April 2013

<b>Thursday 25 April</b>		
08.45 - 9.40	County Foyer	Check-in and registration. Coffee and Danish pastries
9.40 - 9.45	County Suite	Chairman's Welcome
9.45 - 10.25	County Suite	Plenary 1 - Industry landscape post RDR session. (Russell Warwick, Director Distribution Strategy, Prudential UK)
10.25 - 11.00	County Suite	Plenary 2 - Legal landscape/legal regulatory update. (Joshua Rozenberg, former BBC Legal Editor)
11.00 - 11.25	County Foyer	Coffee Break
11.25 - 12.10	County Suite	Plenary 3 – Economic/Markets overview. A Macro overview from 2 perspectives. (Nick Clay, Manager BNY Melon Newton Global Income and Ariel Bezalel, Manager Jupiter Strategic Bond)
12.10 - 12.30	County Suite	Plenary 4 - SIFA Update plans and aspirations for members plus Group perspective. (Matt Timmins/Stuart Bushell)
12.30 - 1.30	Restaurant	Lunch
13.35 - 14.20	Breakout rooms - 8 Workshops	Octopus Investments – IHT – Overcoming the usual objections Standard Life – Offshore Tax Planning – Beware the Bite Just Retirement – Demographic time bomb Russell Investments – Advantages of cashflow forecasting Aegon – RDR is not just about exams Aviva – Retirement Planning – a sales opportunity for every client Old Mutual Wealth – Answering those tough retirement questions 7IM – Family Office = Trusted Adviser
14.25 - 15.10		
15.10 - 15.35	Ground /1st Floor Refreshment Station	Coffee Break
15.35 - 16.20	Breakout rooms - 8 Workshops	As above
16.25 - 17.40	County Suite	SIFA Member Peer Group session. 3 members 15/20 mins each plus Q&A
17.40 - 19.30	Leisure	
19.30 - 20.15	County Foyer	Champagne Reception
20.15 - 22.15	County Suite	Conference Dinner (Black Tie)
22.00	Bars	Open until 1.30 a.m.

<b>Friday 26 April</b>		
07.30 - 09.00	Main restaurant	Breakfast
9.15 - 10.05	County Suite	Dan Russell, Sales & Marketing Director of Verbatim AM, will explore how leading advisory firms are building and delivering a service level that ensures the adviser is most important link in this value chain and the most difficult for a client to change. He will share real examples of how advisory firms are arranging the different parts of the financial services value chain. This will include: Delivering services to clients using financial planning tools; Integrating platforms, tax wrappers and product providers into the advice process; Integrating investment managers (including multi-manager, model portfolios and DFMs) into your service offering whilst maintaining control of the client relationship.
10.05 - 10.45	County Suite	SIFA Response to Legal landscape - New initiatives and support for working with Solicitors/ABS in 2013
10.50 - 11.00	County Suite	Closing address, closing questions and thanks (a take-away lunch will be provided)