



Partnership Opportunities

*The Future of Advice - The
Defaqto Adviser Conference*

Tuesday 26 November 2024,
National Conference Centre, Solihull



Defaqto National Adviser Conference

Tuesday 26 November 2024,
National Conference Centre (B'ham) aka Motorcycle Museum

Event objectives

- This year's event will be even bigger and better than ever before as we are introducing an exciting new format including keynote speakers, presentations, workshops and panel discussions
- The conference structure is a mix of 4 Headline Speaker Sponsors, 6 Exhibitor Plus Panel Speakers, 3 Defaqto Speakers, 2 Defaqto Panel Chair Speakers, 2 Guest Speakers and 16 Exhibitors (this includes 4 Headline Speaker Exhibitors, 6 Exhibitor plus firms)

How will it work?

- A full day event aimed at bringing 200 - 225 UK financial adviser delegates into contact with key industry personalities, experts, regulatory bodies and provide and service providers



Schedule of the day

08:30 – 09:30	Registration	Grab a coffee and network with peers
09:30 - 09:50	Welcome Keynote	The future of advice with John Milliken, CEO, Defaqto. <i>Chaired by Dan Russell, MD Distribution Solutions, Fintel</i>
09:50 – 10:20	Keynote Partner 1	Key Partner presentation 1
10:20 – 10:50	Keynote Partner 2	Key Partner presentation 2
10:50 – 11:20		Coffee break
11:20 – 11:50	Keynote Partner 3	Key Partner presentation 3
11:50 – 12:20	Keynote Partner 4	Key Partner presentation 4
12:20 – 13:20		Lunch
13:20 – 14:00	Keynote	Emerging risks and working together to ensure the right consumer outcomes <i>With Nick Hulme, Head of Department, Advisers Wealth and Pensions/Consumer Investments, Financial Conduct Authority</i>
14:00 – 14:30	Keynote	Defaqto insights
14:30 – 15:00		Coffee Break
15:00 - 15:50	Panel Discussions	1. Ongoing advice & charging 2. Retirement income
15:50 - 16:20	Keynote	<i>UK pensions - what went wrong and what does the future hold? /OR/ How we are planning and thinking about the future differently?</i>
16:20 – 17:00		Wave goodbye

Panel Themes and Participants

Breakout Panel sessions

Themes are defined by Panel Specialists. Examples of expected Panel Specialists are below:

- Value Specialist
- Tax Wrapper Specialists
- Platform Specialists
- Financial Services Tech Specialists
- MPS Specialist
- Alternative Investment/Assets Specialist
- Income Specialist
- SRI/ESG Specialist
- Active v Passive Specialist



Reasons to become a partner

1

Connect

With advisers – develop relationships with current clients and generate leads for new business



2

Build

Adviser awareness – raise the profile of your proposition by showcasing it to an engaged audience



3

Boost

Your credibility and broaden your competitive advantage – demonstrate your expertise, insight and value add that you bring to your clients



4

Enhance

Your brand by associating it with Defaqto, the leading independent experts in financial information and investment planning software.

What the attendees have to say



Very informative. The guest speakers are always clear and willing to discuss further during breaks. Networking is also good as I get to network with other advisers.

Gary Hulme



Great venue, great speakers, knowledge enhancement.

Paul Bassinder



First for quite some time, found the topics of great interest and presenters very refreshing. Will certainly return if invited.

George Kennedy

The who?

Bringing together 200 senior decision-makers from the following sectors; General Insurance, Banking, Life and Protection, Funds and DFM.

Headline Sponsorship Packages

- CPD accredited face-to-face events and webinars featuring content from up to four presenters and our Defaqto experts
- Four partners presentations deliver 20-25 minute presentations with a Q&A slot

Conference package	Partner inclusions
Speaking opportunity	
Presentations (25 minutes)	✓
Branding	
Inclusion of logo and company message (50 words) on dedicated event website	✓
Inclusion of logo in the roadshow handbook	✓
Inclusion of logo on delegate invites and reminders	✓
Logo on event signage and conference presentations	✓
Use of branded emails to invite your clients	✓
Exhibition space	
Space for two pop-up banner stands	✓
One table for literature	✓
Passes to each event (including speaker)	4
Delegate information	
Pre event delegate list; name, company, job title (two weeks before)	✓
Post event delegate list; name, company, job title, and opted in email addresses (limited for use in two emails)	✓
Price (excl. VAT)	£25,000 (2 Positions remain)

Exhibitor Plus package

- For Exhibitors that appear as one of three (max) specialists, in the 30 minute panel sessions within the event

Conference package	Partner inclusions
Speaking opportunity	
Breakout Panel session (maximum of three panel specialists / 30 minutes)	✓
Branding	
Inclusion of logo in the conference event app/ handbook/ social media	✓
Exhibition space	
Space for one 3 x 2m exhibition space	✓
One table, 2 chairs for literature	✓
Passes to each event	✓
Exhibition space	
Passes to each event	3
Delegate information	
Pre event delegate list; name, company, job title (two weeks before)	✓
Post event delegate list; name, company, job title	✓
Price (excl. VAT)	£10,000

Exhibitor package only

- A one-day conference, CPD accredited, adviser face-to-face event featuring content from Defaqto experts and key industry speakers
- Conference designed to allow networking, breaks and refreshments and keynote presentations
- There will be Defaqto experts and invited industry specialists who will deliver presentations on wider regulatory and market analysis

Conference package	Partner inclusions
Branding	
Inclusion of logo and company message (50 words) on dedicated event website	✓
Inclusion of logo in the conference event app/ handbook/ social media	✓
Exhibition space	
Space for one 3 x 2m exhibition space	✓
One table, 2 chairs for literature	✓
Passes to each event	✓
Exhibition space	
Passes to each event	3
Delegate information	
Pre event delegate list; name, company, job title (two weeks before)	✓
Post event delegate list; name, company, job title	✓
Price (excl. VAT)	£7,500

List Prices for Official Provider Sponsorships

Headline Speaker Sponsorship	Exhibitor Plus Panel Sponsorship	Exhibitor Positions
£25,000+ vat (2 Positions remain)	£10,000+ vat (3 Positions remain)	£7,500+ vat (4 Positions remain)

All figures are exclusive of VAT

For further information please contact:

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