

Wednesday 10 November 2021

**SCHEDULE OF THE DAY**

0845 - 0930	<b>Registration, coffee and buns!</b>			
0930 - 1010	<b>Welcome</b> - Stuart Podmore, Schroders <b>Opening keynote: Where next with client investments?</b> - Ben Gutteridge, Director of Model Portfolio Services, Invesco			
1010 - 1040	<b>Keynote: FLEX!: Reinventing Work for a Smarter, Happier Life.</b> Annie Auerbach, co-founder of trends agency Starling			
1040 - 1055	<b>Coffee &amp; Networking</b>			
1100 - 1150	<b>Intergenerational wealth transfer, Pt 2</b> <i>Speaker: Gillian Hepburn, UK Intermediary Solutions Director, Schroders</i>	<b>Thematic investing in a changing world</b> <i>Speaker: David Docherty, Fund Manager, Schroders</i>	<b>Sustainable Investing – How mainstream is it?</b> <i>Speaker: Clive Emery, Fund Manager, Invesco</i>	<b>Embracing tech for the new norm</b> <i>Speaker: Sarb Thind &amp; Intelliflo</i>
1155 - 1245	<b>Intergenerational wealth transfer, Pt 2</b> <i>Speaker: Gillian Hepburn, UK Intermediary Solutions Director, Schroders</i>	<b>Schroder Investment Solutions range</b> <i>Speaker: Alex Funk, CIO, Schroders</i>	<b>Capturing opportunities amid uncertainty</b> <i>Speaker: Patrick Garvin, Invesco</i>	<b>Embracing tech for the new norm</b> <i>Speaker: Sarb Thind &amp; Intelliflo</i>
1245 - 1340	<b>Hot buffet luncheon - more networking!</b>			
1340 - 1430	<b>Schroder Investment Solutions range</b> <i>Speaker: Alex Funk, CIO, Schroders</i>	<b>Thematic investing in a changing world</b> <i>Speaker: David Docherty, Fund Manager, Schroders</i>	<b>Small Steps: Speaking The Language Of Engagement</b> <i>Speaker: Gary DeMoss &amp; Scott West, Invesco Consulting</i>	<b>Sustainable Investing – How mainstream is it?</b> <i>Speaker: Clive Emery, Fund Manager, Invesco</i>
1435 - 1525	<b>Engaging with the digital assets opportunity</b> <i>Speaker: Toby Barklem and Duncan MacInnes, Ruffer</i>	<b>Regulation, regulations and more regulations.</b> <i>Speaker: Henry Cobbe, Elston Consulting</i>	<b>Small Steps: Speaking The Language Of Engagement</b> <i>Speaker: Gary DeMoss &amp; Scott West, Invesco Consulting</i>	<b>Democratising true Goals Based Investing through semi-automation of the Suitability Report</b> <i>Speaker: Rob Harradine, Ammonite Wealth</i>
1530 - 1600	<b>Closing Address &amp; Farewell</b>			
	<b>Bringing it all together: what to expect in 2022 and beyond</b> - Stuart Podmore, Schroders			
1600 - 1700	<b>Farewell drinks</b>			

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### **Where next with client investments?** - *Ben Gutteridge, Director of Model Portfolio Services, Invesco*

Has the stock market recovery run its course... or even gotten ahead of itself?

Is the inflationary threat a threat to investments?

Should I be favouring Growth or Value?

What use are bonds in my portfolio?

Where else can we turn?

### **FLEX!: Reinventing Work for a Smarter, Happier Life.** *Annie Auerbach, co-founder of trends agency Starling*

Working 9 to 5 in an office doesn't work for most. The world is changing, but until the pandemic, companies turned a blind eye.

Now it is time to reinvent the systems that were holding us back.

### **Bringing it all together: what to expect in 2022 and beyond** - *Stuart Podmore, Schroders*

Whilst we know that it's crazy to make predictions in this turbulent world, there are some trends that we believe are important to recognise and understand. We'll close the conference by reflecting on markets and inescapable truths, while summarising the trends that we believe are most important to paraplanners in building a scalable and sustainable advisory business for the long term.

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### **Schroder Investment Solutions range**

Alex Funk, CIO at Schroder Investment Solutions will help demystify some of the terminology that you are bombarded with on a daily basis. Alex will address the key differences between Active and Passive investing and how there could (controversially!) be room for both. The pandemic felt like a turning point for ESG investors. Alex will spend the second half of the session identifying how this can be incorporated into the asset allocation choices made by your clients and how you can convert these social costs into meaningful financial costs that your clients can understand.

### **Thematic investing in a changing world.**

David Docherty will introduce thematic investing at Schroders and will discuss some of the world's most powerful and durable investment themes. These themes include disruption, climate change, energy transition, healthcare innovation, urbanisation, digital infrastructure, smart manufacturing, sustainable food and water and changing consumer lifestyles. In so doing, he will examine how far COVID 19 has affected how these themes are likely to play out in coming years.

### **Intergenerational wealth transfer: crypto and the next generation**

Research highlights that over the next decade £1 trillion of assets will flow to future generations and 65% of those inheriting wealth are unlikely to use the same financial advisers as those passing on their wealth. This next generation of investors may be perceived as 'low value' and uninterested in saving by financial planners, but is this a ticking time bomb and an accurate portrayal? In fact 2.3 million of UK consumers hold crypto assets and 74% of users are aged 25-44.

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### **Sustainable Investing – How mainstream is it?**

Invesco research suggests 80-90% of clients care about sustainable investing and want to know more from advisors. Importantly, clients want to increase investment exposure. Clive Emery will investigate client demand and attitudes to sustainable investing as well as the challenges and complexities of this type of investing. He will review ways to improve communication and engagement with clients and then review the Summit Responsible global multi asset range that was built from the ground up to embed responsible investing at its heart. The range aims to deliver a clear, consistent and credible responsible investment proposition, that importantly can be evidenced.

### **Capturing opportunities amid uncertainty**

Emerging markets by nature tend to be more volatile than developed markets, with Covid-19 and events in China adding to market volatility so far this year. However, the short-termism of markets often creates opportunities for long-term investors like us. The presentation will cover the team's: investment approach, providing insight into how best to capitalise on underappreciated areas of global emerging markets; current portfolio positioning; and latest views on key markets.

### **Embracing tech for the new norm**

- Technology use pre-covid & Post-covid within financial services
- Trends we're seeing within the market
- Technology developments of interest

### **Small Steps: Speaking The Language Of Engagement**

Invesco's new research in partnership with NEST Insight demonstrates how simple changes to the use of language when talking about pensions could empower people in their 30s, 40s and 50s engage with their savings, and help them take actions that can improve their income in retirement. In this session we'll learn how to speak the language of engagement!

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### **Engaging with the digital assets opportunity**

Fast-growth tech stocks have dominated markets in recent years. But will they always? We look at how technological disruption is itself contributing to regime change for financial markets. The new regime will require radically different investment strategies to those which have worked so well in recent decades. We'll look at winners and losers in the new era, including the potential fate of those fast growth tech stocks.

### **Regulation, regulations and more regulations. This discussion could fill a day, but let's instead talk opportunities, developments and innovations within the space rather than the mere coverage of regulatory measures - important though they are.**

Nikhil Rathi Chief Executive Officer, at the FCA, recently said 'Financial Services have a central role to play if the UK is to take full advantage of the opportunities ahead. Whether that is addressing technological disruption, meeting the challenge of climate change, adjusting to a post-Covid world or using the flexibility presented by our departure from the European Union'. Also that 'The FCA is committed to meeting these challenges, without compromising on the high standards for which the UK is justly renowned, building on the UK's strengths as an open, global financial centre' - but let's be honest, it's never as easy as it sounds is it?

This session will discuss some of those opportunities and innovations (ESG, AI/ML, crypto) and cover the reg drivers to keep the firms out of trouble.

### **Democratising true Goals Based Investing through semi-automation of the Suitability Report**

- What advancements in Suitability Report automation would IFAs like to see?
- These reports are a big component part of the initial cost to onboarding new clients. Can a cost reduction in this part of the onboard journey be part of the solution to the advice gap?
- Suitability Reports are key – how can they evolve over the next 3 years?