THE FEDERATION OF EUROPEAN INDEPENDENT FINANCIAL ADVISERS

AGENDA

FEIFA Autumn Conference Series, November 2020

Correct at time of issue but subject to amendment. Note: All event times are GMT.

WEEK 1

Tuesday 3rd November - Brexit & COVID: Advising in a Digital World

10.00 - 10.05 **FEIFA Introduction & Welcome**
Paul Stanfield, CEO, FEIFA

10.05 - 10.30 **Keynote Presentation: The Evolution of Professional Financial Advice**
Keith Richards, CEO, Personal Finance Society

10.30 - 11.00 **Presentation: Post-COVID – A New Economy**
David Coombs, Head of Multi-Asset Investments, Rathbones

Wednesday 4th November - Drinks Reception: Brexit - 17.00

Thursday 5th November - Excelling in a Changing Environment

10.00 - 10.05 **FEIFA Introduction & Welcome**
Paul Stanfield, CEO, FEIFA

10.05 - 10.35 **Presentation: Building your Business in a Digital Age**
Penny Lovell, CEO, Sanlam Private Wealth (VAM Funds)

10.35 - 10.50 **TED Talk: Are you challenging your clients enough?**
James Clark, Head of Expatriate Sales (Europe), Utmost Wealth Solutions

10.50 - 11.05 **TED Talk: International Pension Transfers - Coping with Change**
Paul Forman, International Sales & Technical Manager and Darren Moth, International Sales Manager, Novia Global

WEEK 2

Tuesday 10th November - Brexit, COVID and ESG: Challenges and Opportunities

10.00 - 10.05 **FEIFA Introduction & Welcome**
Paul Stanfield, CEO, FEIFA

10.05 - 11.05 **Panel Discussion:**
Craig Reeves, Board Director and Founder, Prestige Funds
Keith Richards, CEO, Personal Finance Society
Simon Colboc, Secretary-General, FECIF European Pensions Institute
Host: Paul Stanfield, CEO, FEIFA

Wednesday 11th November - Drinks Reception: Business Models & Best Practice - 17.00

Thursday 12th November - Insurance-based Investment Products for 2021 and Beyond

10.00 - 10.05 **FEIFA Introduction & Welcome**
Paul Stanfield, CEO, FEIFA

10.05 - 10.35 **Presentation: The possibilities and benefits of a Luxembourg life assurance contract**
Michele Nerantzis, Corporate Communication and Product Manager, Marie Salvo, Country Manager dedicated to the UK Expats business, Bernard Denis, Chief Investment Administration Officer and Fouad Charrite, Head of Investment Solutions and Business Coordination Departments, OneLife

10.35 - 11.05 **Presentation: France: the compelling nature of assurance vie**
David Denton, Head of International Technical Sales, Quilter International

WEEK 3

Tuesday 17th November - ESG: Sustainable Investing & Regulations

10.00 - 10.05 **FEIFA Introduction & Welcome**
Paul Stanfield, CEO, FEIFA

10.05 - 10.35 **Presentation: There is no economy without water, no sustainable economy without waste management**
Saurabh Sharma, Portfolio Manager, Fidelity International

10.35 - 11.05 **Presentation: The four pillars to sustainable investing**
Tim Brown, Senior Product Specialist, Janus Henderson Investors

Wednesday 18th November - Drinks Reception: ESG, Regulation & Suitability - 17.00

Thursday 19th November - Retirement Planning for the Modern Client

10.00 - 10.05 **FEIFA Introduction & Welcome**
Paul Stanfield, CEO, FEIFA

10.05 - 10.20 **TED Talk: Adviser views in the spotlight: technological developments to boost the SIPP market**
Craig Cheyne, Managing Director, iPensions Group

10.20 - 10.35 **TED Talk: QNUPS - UK Legislation**
Simon Ferbrache, Pensions Director, The Bourse Group and Matthew Harrison, Senior Associate, Withers LLP

10.35 - 11.00 **Keynote Presentaton: How to find retirement clients on LinkedIn**
Andy Gwynn, Business Coach, Speaker and Author

WEEK 4

Tuesday 24th November - Investment Strategies for the Future

10.00 - 10.05 **FEIFA Introduction & Welcome**
Paul Stanfield, CEO, FEIFA

10.05 - 10.20 **TED Talk: Direct Equity Portfolios – diversification through individual stock selection**
Andrew Prosser, Senior Investment Manager, Brooks Macdonald International

10.20 - 10.35 **TED Talk: Managing income risks in retirement**
Jim Henning, Head of Investment Services, Dynamic Planner

10.35 - 11.05 **Presentation: Global Cities: positioned to thrive post-COVID-19**
Tom Walker, Co-Head of Global Real Estate Securities, Schroders

Wednesday 25th November - Drinks Reception: Retirement Planning & Risk Management - 17.00

Thursday 26th November - Succeeding in the New World

10.00 - 10.05 **FEIFA Introduction & Welcome**
Paul Stanfield, CEO, FEIFA

10.05 - 10.20 **TED Talk: Navigating the green maze**
Louie French, Sustainable Portfolio Manager, Tilney for Professionals

10.20 - 10.35 **TED Talk: Pandemics and Politics - a recipe for resilience**
Graham Bentley, Director, Marlborough Group

10.35 - 11.00 **Keynote Presentation: Reboot Your Neck-Top Computer & Control Your Inner Critic**
Andy Gwynn, Business Coach, Speaker and Author
Closing comments