

Conference

Education

WEB

E-learning

Knowledge



AGENDA

FEIFA Autumn Conference
Series, November 2020

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

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 Presentation: 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**

SYNOPSSES AND SPEAKER DETAILS



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



Keith Richards
CEO

PERSONAL FINANCE SOCIETY

Keith Richards was appointed Chief Executive Officer of the Personal Finance Society (PFS) in May 2013 and has evolved the role and purpose of the professional body to become the largest in Europe with a growing international presence from its office in Hong Kong. Keith is also Chief Membership Officer for the Chartered Insurance Institute and is responsible for its group membership strategy as well as the development of CII-Hong Kong and strategic relationships across Asia Pacific.

With over 30 years' experience operating at executive level, Keith is regularly called upon for comment and contribution both home and abroad by various organisations, including governments, regulators and media.

Keith established a strong media profile whilst representing one of the UK's largest IFA Networks (Tenet Group) as Group Distribution and Development Director, prior to which he was Head of Retail for the largest mutual insurance company in the UK, Royal London Group. Actively engaged in the promotion of Insurance and financial services within the UK and internationally as a profession, he has contributed to the boards of AIFA, APFA and AMI.

He sits on the board of the European Financial Planning Association (EFPA), Chairs the Pension Advice Taskforce, is a member of various government and regulatory working groups and recognised as one of the Top 100 Influential figures Internationally, by International Adviser.

The Evolution of Professional Financial Advice

This keynote session will review the impact of COVID-19 on the sector, its clients and regulation, as well as the challenges and opportunities that are likely to force further evolution of financial planning in a post-COVID landscape.



David Coombs
Head of Multi-Asset
Investments



RATHBONES

David joined Rathbones in 2007. He is a member of the Investment Executive Committee as well as the Strategic Asset Allocation Committee.

David is responsible for developing their investment propositions for national financial advisory firms and networks. He is the lead manager for the Rathbones Multi-Asset Portfolio Funds and the offshore Luxembourg-based Sicavs.

David previously worked at Barings for almost 20 years where he managed institutional and private clients via pooled vehicles and segregated accounts.

He joined Barings in 1988 from Hambros, where he managed multi-manager portfolios for private clients.

Post-COVID - A New Economy

David Coombs, Head of Multi-Asset Investments at Rathbones will share his thoughts on the US election.

He will discuss any changes to his strategy and also give an update on his approach to Brexit.

SYNOPSSES AND SPEAKER DETAILS

Thursday 5th November - Excelling in a Changing Environment



Penny Lovell
CEO



VAM FUNDS

Penny Lovell joined Sanlam to set up the Private Office in 2017 and became CEO of Sanlam Private Wealth in 2019. She has over 25 years advising private clients, families and charities. Previously, Penny was Managing Director at Rothschild and Fleming Family and Partners. Before joining Sanlam, Penny was Head of Private Client, Marketing and Distribution at Close Brothers Asset Management. Penny graduated from Manchester University with a BA Honours in English and Italian and trained in financial planning and investment management at Friends Provident and then Coutts.

Building your Business in a Digital Age

In lieu of another market or product update, this Q&A session is designed to share with advisers, some experiences and ideas for turning what has been one of the toughest backdrops in history into an opportunity for developing new business and client relationships in an increasingly digital world. The objective is to inspire FEIFA members with ideas for acquiring new clients and deepening their relationships with existing ones by sharing some successes they've had, as well as discussing some of the themes that might be important for financial advisers in the future.



James Clark
Head of Expatriate
Sales (Europe)



UTMOST WEALTH SOLUTIONS

James Clark joined the industry as a graduate in 2001 working for AXA in a regional Broker Consultant role until 2013, when he joined the Key Account team specialising in working with external platforms and DFMs. When AXA exited the UK financial services market in 2016, James became part of the Utmost Wealth Solutions team heading up the UK Key Accounts. In July 2019, James accepted a newly created role as Head of Expat Sales (Europe) to develop the Utmost Wealth Solutions proposition for expatriates.

Are you challenging your clients enough?

A brief discussion regarding the financial planning needs of expatriate clients. The interactive session will look at the current situation in how advice is given and whether more could be done to increase funds under influence for intermediaries.



Paul Forman
International Sales &
Technical Manager



Darren Moth
International Sales
Manager



NOVIA GLOBAL

Paul Forman has been involved in financial services for over twenty five years, including adviser facing sales roles for the last twenty years. He is a Chartered Financial Planner and holds Fellowship status with the Personal Finance Society. Paul has extensive UK and International experience which he has gained in earlier roles with an international pension trustee and before that as regional sales manager for several leading offshore life offices.

Darren Moth has worked within Financial Services since 2005, including roles as a Paraplanner, Support Team Leader and Practice Manager within different Adviser Firms in the South West of England. As an International Sales Manager, Darren endeavors to draw on his knowledge of platforms and experience as an 'end user' to provide outstanding customer service, ensuring that Novia Global delivers a market leading offshore proposition.

International Pension Transfers - coping with change

A decade of legislation changes has shaped the adviser landscape of today, particularly when now dealing with expat clients looking to transfer both UK pensions and existing schemes that they might have transferred previously. Whilst the future might initially appear bleak for advice in this area, the outlook is actually quite the opposite – opportunities exist for advisers who are experienced and knowledgeable, and prepared to be resilient during the ever-changing COVID environment that we are working in today.

SYNOPSSES AND SPEAKER DETAILS



Tuesday 10th November

BREXIT, COVID and ESG: Challenges and Opportunities

This wide-ranging panel session will cover the key drivers that will create threats and opportunities, in 2021 and beyond. The effect of Brexit, across the whole of Europe, will be debated - alongside the now intertwined impacts of COVID-19 and digitalisation. New regulations and consumer trends in the area of ESG will also be discussed, not least in terms of assessing the consequences of both on business models, best practice and suitability. There will also be a deliberation on the future of retirement planning and risk management. Underpinning all of this will be an analysis of the impact of technology at all points across the financial advisory spectrum. The below diverse and highly expert panel will provide unique insights.



Craig Reeves
Board Director and
Founder



PRESTIGE FUNDS

Since 2007, Craig Reeves has been a Director and Founder of Prestige Capital Management Limited, Prestige Fund Management Limited, Prestige Asset Distribution Limited and Prestige International Marketing Services Limited and is a Board Director of various international Prestige Funds. He is also a Director of Nucleus Holdings Limited and is a co-founder and non-executive director of OpenFunds Investment Services AG.

Formerly Managing Director and co-founder of Platinum Capital Management Limited and Head of Portfolio Management and Asset Allocation at Titan Capital Management Limited (both international asset management groups), Craig also has prior experience as a Proprietary Trader at Gaiacorp Trading Limited (another international asset management group) and at London Currency Exchange Limited (a private client/proprietary trading house) - and an internship at Bank of America (in London). He has also previously provided retained consultancy services to a large international family office, an international stockbroker, a pension consulting group and an international real estate investment group, all London based.

He has over 25 years' experience in financial services as a professional investment manager, trader and investor of alternative investments, hedge funds, capital markets and real estate and has written several articles for various financial publications, including the AIMA Journal. He has served as a Board Director on over 20 international Funds. He graduated with a BA (Hons) in Business Administration from Huddersfield University and a Higher National Diploma in Business and Finance from University of Greenwich (London). He also attended the New York Institute of Finance (NYIF) where he studied various financial markets and derivative trading courses and is also a member of the Chartered Institute for Securities and Investment (CISI).



Simon Colboc
Secretary General

FECIF EUROPEAN PENSIONS INSTITUTE

Simon has over 25 years' experience in Financial Services, including executive level positions at Fortis, BNP Paribas and Prudential Plc. He is a member of FECIF's Advisory Committee and, as Secretary General of FEPI (FECIF European Pensions Institute), heads up its work on pan-European pensions.

He also runs the Financial Services practice of Paris-based consulting boutique CMI strategies.



Keith Richards
CEO

PERSONAL FINANCE SOCIETY

Keith has over 30 years' experience in financial services, operating at executive level across both manufacturing and distribution.

He presently sits on the board of the European Financial Planning Association (EFPA) and the Personal Finance Society (PFS), where he was appointed Chief Executive in May 2013.

Full bio - as per page 4.

SYNOPSSES AND SPEAKER DETAILS



Thursday 12th November

Insurance based Investment Products for 2021 and Beyond



Michele Nerantzis, Corporate Communication and Product Manager



Marie Salvo, Country Manager dedicated to the UK Expats business



Bernard Denis, Chief Investment Solutions and Business Coordination Administration Officer



Fouad Charrite, Head of Investment Solutions and Business Coordination Departments



ONE LIFE

Michele Nerantzis has been in the financial services industry for over 27 years, working in the UK, Paris and Luxembourg for HSBC Group, Lombard International Assurance and OneLife. Her roles cover Marketing & Communication, Business Development and Product Solutions.

Marie Salvo is a Finance graduate and currently holds the position of Country Manager at OneLife. Multilingual and an expatriate herself, Marie is highly knowledgeable concerning the Luxembourg life insurance industry, with more than 10 years' experience. She is passionate in defining and delivering the best OneLife solution for the clients of financial advisers.

Bernard Denis has been working in the Luxembourg financial sector for more than 25 years, holding a number of positions at E&Y, Morgan Stanley Bank, Chase Manhattan Bank and Lombard International Assurance. In recent years, he's been working as an independent consultant for various insurance companies.

Fouad Charrite joined OneLife during 2018, after more than ten years within a professional services firm, auditing Investment Funds, Private Equity structures and Securitization vehicles. Today he is OneLife's Head of Investment Solutions and Business Coordination Departments.

The possibilities and benefits of a Luxembourg life assurance contract

This presentation will initially explain about OneLife – who it is and what it does. It will then look at some of its solutions and how its cross-border Luxembourg life assurance products can provide opportunities and solutions for many clients.

QUILTER INTERNATIONAL



**David Denton
Head of International
Technical Sales**



As Quilter International's Head of International Technical Sales, David Denton works with financial advisers and their clients all over the world, specialising in taxation, trusts and pensions. With several decades of international experience.

David has built a strong reputation and is a respected speaker on industry matters and technical subjects.

France: the compelling nature of assurance vie

Every country has its own tax advantaged investment regimes to encourage savings and investments, and France is no different. There, assurance vie is a compelling solution with unique advantages. As well as being tax efficient for the policyholder in their lifetime, it can facilitate French inheritance planning, and at the same time overcome the Napoleonic code in terms of heirship laws that someone from the other side of 'la manche' would rarely contemplate.

Listen to David Denton's presentation to learn how to explain the wide ranging benefits of our fantastic new solution for your English Speaking Expat clients in France.

SYNOPSSES AND SPEAKER DETAILS



Tuesday 17th November - ESG: Sustainable Investing & Regulations



Saurabh Sharma
Portfolio Manager



FIDELITY INTERNATIONAL

Saurabh Sharma is the Portfolio Manager of the Fidelity Funds - Sustainable Water & Waste strategy. His role involves analysis/due diligence on investment ideas, thematic and ESG research, and engagement activities. Saurabh is also an Associate Investment Director in Fidelity's equity team and has over 9 years of industry experience. Prior to joining Fidelity in 2014, he worked as an equity research analyst for GlobalData from 2010 to 2011 and for Moody's Analytics (erst. Copal Amba) from 2011 to 2014. He is a Chartered Alternative Investment Analyst (CAIA); has an MBA in Finance from IBS, Hyderabad, India; a Bachelor of Commerce Hons. in Accounting and Finance from the University of Calcutta; and a CFA (ICFAI) from the Institute of Chartered Financial Analysts of India (ICFAI).

There is no economy without water, no sustainable economy without waste management

The story of water and waste is as old as civilisation itself, which continues to evolve. Primitive settlements have evolved into major towns and big cities, with the most successful ones demonstrating great water and sanitation systems. The theme is global but impacts everyone at a local level. Population growth, environmental constraints, supportive regulation, urbanisation rate and global wealth creation are all working conjunctively in the themes' favour. Companies involved in the water and waste value chains are at the centre of one of the major themes of life on earth. Yet these remain under-researched sectors, with few funds investing across both.

The Fidelity Sustainable Water & Waste strategy is a thematic Environmental, Social, and Governance (ESG) strategy that seeks to deliver long-term capital growth for investors by investing globally in companies involved in the design, manufacture, or sale of products and services in connection with the water and waste management themes. The Fund incorporates a comprehensive ESG framework including all Environmental, Social and Governance factors when analysing companies that are considered to be part of the portfolio.



Tim Brown
Senior Product
Specialist



JANUS HENDERSON INVESTORS

Tim Brown is a Senior Product Specialist at Janus Henderson Investors, responsible for a number of Global and Thematic equity products. Prior to joining Janus Henderson in 2018, he spent 8 years at Vanguard Asset Management performing a number of roles. In his most recent role, he served as a Product Specialist covering a variety of active Global equity funds and was responsible for conducting investment reviews and finals pitches to a global investor audience. Tim earned a BSc degree (Hons) in Business from Royal Holloway University of London. He has 11 years of financial industry experience.

The Four Pillars to Sustainable Investing

Innovation is fast becoming synonymous with sustainable development objectives of companies. The speed of change is rapid, and we anticipate a decade of significant change. A number of dominant themes are already emerging: digitalisation, cleaner energy, electrification and hyper connectivity. Numerous companies are embracing these themes, enabling new ways of organising our economies and promoting greater efficiency and circularity.

Tim will explore:

- The key drivers leading rapid economic change and how companies are evolving to embrace this new dynamic
- The importance of identifying companies that have a positive impact on society and the environment and avoiding those industries that pose significant transition risk
- The relevance of integrating both traditional financial and ESG analysis into investment decision making and how it applies to the 'Triple bottom-line' approach
- Why active investing, engagement, better investment outcomes and better environmental and social outcomes go together
- How transparency and reporting are fundamental to monitoring results and outcomes

SYNOPSSES AND SPEAKER DETAILS



Thursday 19th November - Retirement Planning for the Modern Client



Craig Cheyne
Managing Director



iPENSIONS GROUP

Craig Cheyne brings over 30 years' financial services experience along with valuable insight to the IFA sector to iPensions Group. Having previously worked in the banking industry before qualifying and building a career as an IFA, Craig focused on investment and pensions advice before moving on to relationship management. Prior to joining iPensions, Craig gained international experience in Singapore and South East Asia, working with expatriate wealth distribution channels for a large global life company.

Adviser views in the spotlight: technology developments to boost the SIPP market

Our nationwide study among advisers found widespread support for investment in technology by providers as a positive for expanding the SIPP market over the next three years with research highlighting key developments. With a focus on market needs and developments, the session will explore the role of technology in driving transparency and enabling stronger client-adviser relationships, whilst providing control and ease of business.



Simon Ferbrache
Pensions Director



THE BOURSE GROUP

Simon Ferbrache joined Bourse to head up the pensions team early in 2018. He started his career in pensions almost 2 decades ago in Guernsey and has travelled extensively providing pension and trustee companies with his expertise.

His experience ranges from managing and designing multi-jurisdictional pension and saving plans for large blue-chip companies to the establishment and management personal plans, including QROPS, QNUPS and US compliant plans. He is now based in Malta but still retains oversight on all pension products the group offers.

WITHERS LLP

Matthew Harrison is a senior associate at Withers LLP in London. His practice encompasses all areas of private client tax, with a particular focus on international pensions.

QNUPS - UK legislation

A short, focused look at what a QNUPS is and recent experience of how they are being best used in practice.



Matthew Harrison
Senior Associate,
Withers LLP

ANDY GWYNN

Andy Gwynn has been coaching business owners, franchisors and professionals to grow their businesses since 2003. Over the last six years he has been coaching his clients and running workshops on how to generate more business through their use of LinkedIn.

How to find retirement clients on LinkedIn

This keynote will show you how to raise your profile and gain more business on LinkedIn - without being pushy! It will explain the 5 Steps to writing powerful posts and the ways to create a personal profile that gets found - and proves your credibility.

It will enlighten you on how your posts can massively help you to grow your network and gain new clients - and how to guarantee thousands of views of those posts. This will enable you to significantly extend your reach and raise your profile - writing posts that will engage your "Lurkers".



Andy Gwynn
Business Coach, Speaker
and Author

SYNOPSSES AND SPEAKER DETAILS



Tuesday 24th November - Investment Strategies for the Future



Andrew Prosser
Senior Investment
Manager



BROOKS MACDONALD INTERNATIONAL

Andrew Prosser joined Brooks Macdonald in 2016 and is responsible for portfolio construction research and he sits on a number of strategy committees. Prior to joining Brooks Macdonald, Andrew worked at Ernst and Young. He has worked in financial services since 2012. Andrew is a Chartered Financial Analyst (CFA) Charterholder, a Chartered Accountant and holds the Investment Management Certificate (Level 4).

Direct Equity Portfolios – diversification through individual stock selection

Understand how Brooks Macdonald International's Investment Office creates and manages medium to high risk equity strategies. Hear how diversified equity portfolios can be constructed for a low ongoing charge by excluding collective investment schemes, through a selection of individual stocks, largely on UK, US and European exchanges.



Jim Henning
Head of Investment
Services



DYNAMIC PLANNER

Jim Henning is Head of Investment Services at Dynamic Planner. He is responsible for the ongoing development and support of the risk profiled propositions and research services across the business, which includes the UK, and for other identified international markets where investment suitability is a regulatory requirement.

Jim has accumulated over 30 years' experience specialising in investment proposition strategy, design, portfolio governance mechanisms as well as investment marketing and promotional support. This has spanned senior management roles based in the UK, as well as International Life Companies and included the marketing of various ethical and ESG investment solutions. Jim holds a Degree in Economics from the University of Birmingham and the Investment Management Certificate.

Managing income risks in retirement

With periods of increased market volatility to be expected, this can amplify the risks associated with income drawdown for retiree clients and this session will address ways advisory firms can manage income outcomes more durably via combining specialist portfolio risk profiling and cash flow modelling techniques.



Tom Walker
Co-Head of Global Real
Estate Securities



SCHRODERS

Tom Walker is Co-Head of Global Real Estate Securities at Schroders, which involves being responsible for the investment strategy of the Schroder Global Cities Real Estate, Schroder ISF Global Property Securities, Schroder Global Real Estate Securities Income and Schroder ISF Asia Pacific Property Securities. He joined Schroders in 2014 and is based in London. Tom was a Deputy Head of Global Listed Real Estate at AMP Capital from 2005 to 2014 and was in the Valuation, Funds Management, Advisory departments at Jones Lang LaSalle from 1999 to 2005, located in both London and Sydney. Qualifications: Graduate Diploma in Real Estate from London South Bank University; MRICS; BA in Politics from University of Newcastle Upon Tyne.

Global Cities: positioned to thrive post COVID-19

Despite the challenges caused by COVID-19, we continue to believe that certain cities will continue to thrive and be the main drivers for economic growth in the country or region they are located in. Cities remain the most efficient way for humans to live and urbanisation will continue to expand. One of the key advantages of global cities is the ability for industries to cluster together, thereby boosting efficiency by sharing knowledge and expertise. This attracts external capital, creating a self-fulfilling prophecy of investment and returns.

SYNOPSSES AND SPEAKER DETAILS



Thursday 26th November - Succeeding in the New World



Louie French
Sustainable Portfolio
Manager



TILNEY FOR PROFESSIONALS

Louie French is an Alternatives Fund Analyst who specialises in infrastructure, renewables, ethical and sustainable investing. He joined Bestinvest's Research team in 2011 having previously worked for a FTSE 250 company and in the property sector. At Tilney, Louie now heads up ESG and the real assets sectors, and he also co-authors the macroeconomic and markets publications.

Outside of the office Louie is an elected London Councillor. He was previously the Chairman of a local authority pension fund and a founding member of the London Pensions Collective Investment Vehicle Committee. His qualifications include a Postgraduate Diploma in Finance and the Investment Management Certificate.

Navigating the Green Maze

As consumers, how we think and how we act all point towards a greener, cleaner more transparent environment. Whether it is reducing our plastic waste, considering our daily carbon footprint or questioning the diversity of company boards, the themes of sustainability are becoming mainstream.

One misconception of investing in this sector is that it's a trade-off between value and 'values' – that you have to compromise investment returns to align your investment morals. At Tilney we believe that is a myth and companies that demonstrate sustainable business operations and have high ethical standards can make positive long-term investments.



Graham Bentley
Director



MARLBOROUGH GROUP

Graham Bentley is consultant to the Marlborough Group's Multi-Asset team and is a Director of Marlborough International. He is a well-known investment strategist, and a popular press commentator on portfolio management issues and the advice profession.

Pandemics and Politics - a recipe for resilience

Investment strategist Graham Bentley examines the relationship between markets and politics, with up to date analysis of how the COVID-19 pandemic is impacting different asset classes across the world.



Andy Gwynn
Business Coach, Speaker
and Author

ANDY GWYNN

Andy Gwynn has been coaching business owners, franchisors and professionals to grow their businesses since 2003. Over the last six years he has been coaching his clients and running workshops on how to generate more business through their use of LinkedIn.

Reboot Your Neck-Top Computer & Control Your Inner Critic

Why do most people know what to do but don't do it? Andy will leave you with tried and tested tools to help you gain or extend confidence, avoid self-sabotaging your actions, and quash the limiting beliefs that hold you back from gaining the results that you are capable of. We all have this "little voice" that can either serve or hinder us.

At some level we collude with ourselves and avoid achieving greater results. Andy will provide you with ideas, tools and strategies that you can use immediately to cut through the "chaff", become more focused, and achieve the results that you choose and deserve.