THE FEDERATION OF EUROPEAN INDEPENDENT FINANCIAL ADVISERS

AGENDA

FEIFA Autumn Conference Series 2021

Correct at time of issue but subject to amendment. Note: All events within the programme are UK time.

FEIFA Autumn Conference Series 2021

Webinar 1: Wednesday 13th October

10.00 - 10.05	**FEIFA Introduction & Welcome** Paul Stanfield, CEO, FEIFA
10.05 - 10.30	**Keynote Presentation: The Future of Financial Advice** Keith Richards, Chair of the Financial Vulnerability Task Force
10.30 - 11.00	**Presentation: Technology for Good** Tim Brown, Senior Product Specialist, Janus Henderson Investors

Webinar 2: Wednesday 20th October

10.00 - 10.05	**FEIFA Introduction & Welcome** Paul Stanfield, CEO, FEIFA
10.05 - 10.35	**Presentation: Green is good, but it's not a free lunch** Will McIntosh-Whyte, Fund Manager of the Rathbone Greenbank Multi-Asset Portfolio funds and Rathbone Multi-Asset Portfolio funds
10.35 - 10.50	**TED Talk: Tesla, Tech and Bitcoin...The difference between speculation and investing** Christian Cole, Head of Equity Strategy, Dominion Funds
10.50 - 11.05	**TED Talk: The Search for Alpha** Rod Guest, International Sales Manager, Marlborough Group

Webinar 3: Wednesday 27th October

10.00 - 10.05	**FEIFA Introduction & Welcome** Paul Stanfield, CEO, FEIFA
10.05 - 11.05	**Panel Discussion:** Clive Moore, Managing Director, IDAD Craig Reeves, Board Director and Founder, Prestige Funds Keith Richards, Chair of the Financial Vulnerability Task Force Host: Paul Stanfield, CEO, FEIFA

Webinar 4: Wednesday 3rd November

10.00 - 10.05	**FEIFA Introduction & Welcome** Paul Stanfield, CEO, FEIFA
10.05 - 10.35	**Presentation: Events raise the risk of inflation** Daniel Casali, Chief Investment Strategist, Tilney Smith & Williamson
10.35 - 11.05	**Presentation: Financial Planning, COVID-19 and Globalization** David Denton, Head of International Technical Sales, Quilter International

FEIFA Autumn Conference Series 2021

Webinar 5: Wednesday 10th November

10.00 - 10.05	**FEIFA Introduction & Welcome** Paul Stanfield, CEO, FEIFA
10.05 - 10.20	**TED Talk: Avoiding pension transfer pitfalls** Paul Forman, International Sales and Technical Manager, Novia Global
10.20 - 10.35	**TED Talk: The importance of Ireland as a location for unit-linked life assurance when advising Expat clients** James Clark, Head of Expatriate Sales (Europe), Utmost Wealth Solutions
10.35 - 11.00	**Keynote Presentation: Your Formula for Success** Andy Gwynn, Business Coach, Speaker and Author

Webinar 6: Wednesday 17th November

10.00 - 10.05	**FEIFA Introduction & Welcome** Paul Stanfield, CEO, FEIFA
10.05 - 10.35	**Presentation: Investing today for tomorrow's world: thematic investing in a post-Covid world** David Docherty, Investment Director, Schroders
10.35 - 11.05	**Presentation: Taking a look under the hood of a TAM ESG investment portfolio** James Penny, UK CIO, TAM Europe Asset Management

Webinar 7: Wednesday 24th November

10.00 - 10.05	**FEIFA Introduction & Welcome** Paul Stanfield, CEO, FEIFA
10.05 - 10.20	**TED Talk: VAM Global Infrastructure Fund** Mark Brennan, Partner, Foresight Capital Management
10.20 - 10.35	**TED Talk: Tackling the ever changing retirement landscape** Craig Cheyne, Managing Director, iPensions Group
10.35 - 11.00	**Keynote Presentation & Closing Comments** **How to get more business from LinkedIn without being pushy or salesy** Andy Gwynn, Business Coach, Speaker and Author Paul Stanfield, CEO, FEIFA

SYNOPSES AND SPEAKER DETAILS

Webinar 1: Wednesday 13th October

Keith Richards
Chair of the Financial Vulnerability Task Force

THE FINANCIAL VULNERABILITY TASK FORCE

Keynote Presentation: The Future of Financial Advice

Keith Richard's keynote session will review the continued impact of COVID-19 on the advisory sector and its clients. He will also look at the present and future effect of regulation, as well as other challenges and opportunities that are likely to force further evolution of financial planning in a post-COVID landscape.

Keith Richards is Chairman of the Financial Vulnerability Taskforce which was set up in January 2021, as an Independent body which has created a Charter to help both firms and individuals address the vulnerable circumstances in life we all face, whilst also meeting the expectations of regulatory standards and expectations. Prior to this Keith was Chief Executive Officer of the Personal Finance Society (PFS) and 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 was also Chief Membership Officer for the Chartered Insurance Institute and had responsibility 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 also sat on the board of the European Financial Planning Association (EFPA), Chaired 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.

Tim Brown
Senior Product Specialist

JANUS HENDERSON INVESTORS

Tim Brown is a Senior Product Specialist at Janus Henderson Investors, responsible for sector and thematic equity products. Prior to joining the firm in 2018, he spent eight years at Vanguard Asset Management in several roles, most recently as a product specialist focused on active equity funds.

Tim earned a BSc degree (Hons) in business and finance from Royal Holloway University of London. He has 12 years of financial industry experience.

Technology for Good

Technology provides solutions to global challenges and is key in the creation of a sustainable future. Learn more about this, the limitations of third party scoring and how to create a sustainable future technologies portfolio.

SYNOPSES AND SPEAKER DETAILS

Webinar 2: Wednesday 20th October

Will McIntosh-Whyte
Fund Manager

RATHBONES

Will McIntosh-Whyte is responsible for managing the Rathbone Greenbank Multi-Asset Portfolio funds and Rathbone Multi-Asset Portfolio funds. He joined Rathbones in 2007, having worked previously as a specialist researcher for Theisen Securities. At Rathbones, Will joined the charities team, and was appointed as an investment manager in 2011, running institutional multi-asset mandates. He has been on the multi-asset team since 2015.

Will graduated from the University of Manchester Institute of Science and Technology with a BSc Hons in Management, and is a CFA charterholder.

Green is good, but it's not a free lunch

Finding opportunities in the drive to a more sustainable planet - but beware of the hype!

Christian Cole
Head of Equity Strategy

DOMINION FUNDS

Christian Cole joined Dominion in 2015 as an equity analyst. His primary role is the Investment Management of Dominion Global Trends – Managed Fund, researching and monitoring the investment universe and working on investment ideas.

Christian holds a BS in economics from Royal Holloway College, University of London. Before joining Dominion, Christian worked as a senior research associate for Sanford C. Bernstein and an equity research analyst for Royal Capital Management, LLC. Christian is a CFA charterholder.

TED Talk: Tesla, Tech and Bitcoin... The difference between speculation and investing

Are we in a bubble now? Speculative bubbles in financial assets are nothing new. History offers us important lessons in how to identify the difference between normal markets and asset price bubbles.

In this talk he looks at examples from history and how they can inform investors today in identifying speculative investment bubbles. He will then go on to explain how to invest successfully through periods of financial excess and protect portfolios from the risks of speculative volatility, touching on whether we think popular financial instruments today (Tesla, tech stocks and bitcoin) are in a bubble or not.

Continued...Webinar 2: Wednesday 20th October

Rod Guest
International Sales Manager

MARLBOROUGH GROUP

Rod Guest has 30 years of experience across a very broad spectrum of life offices, private banks, investment managers, financial advisers, family offices and hedge funds, and is currently the International Sales Manager for Marlborough Funds.

Before joining Marlborough, with an LLB (Hons) in Law, he had 3 years with Touche Ross, followed by various senior positions with Standard Life, Mansard Capital and Allium Capital.

The Search for Alpha

When diversification doesn't work, then what? In times of constrained returns it is more important than ever that client expectations are realistic. In particular, are multi-asset investors likely to be disappointed? How can the potential purchasing power of client portfolios be maintained and enhanced?

Webinar 3: Wednesday 27th October

PANEL DISCUSSION

This wide-ranging panel session will cover the key drivers that will create threats and opportunities, over the next 12 months and beyond. The continued impact of Brexit, across the whole of Europe, will be debated – alongside the now intertwined impacts of COVID-19 and digitalisation. The latest 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 and investment 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.

Clive Moore, Managing Director, IDAD
Clive Moore founded IDAD in 2002 and has worked in the investment sector for over 30 years, specialising in structured investments for most of that time. He is also a director of boutique investment management firm 8AM Global.

Craig Reeves, Founder, Prestige Funds
Craig Reeves, Founder of Prestige Funds 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.

Keith Richards, Chair of the Financial Vulnerability Task Force
The Financial Vulnerability Taskforce was set up in January 2021, as an Independent body which has created a Charter to help both firms and individuals address the vulnerable circumstances in life we all face, whilst also meeting the expectations of regulatory standards and expectations. Prior to this Keith was CEO of the Personal Finance Society (PFS) and evolved the role and purpose of the professional body to become the largest in Europe. He was also Chief Membership Officer for the Chartered Insurance Institute and had responsibility for its group membership strategy as well as the development of CII-Hong Kong and strategic relationships across Asia Pacific.

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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 also sat on the board of the European Financial Planning Association (EFPA), Chaired 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.

SYNOPSES AND SPEAKER DETAILS

Webinar 4: Wednesday 3rd November

Daniel Casali
Chief Investment Strategist, Tilney Smith & Williamson

TILNEY FOR PROFESSIONALS

Daniel has over 27 years' experience in covering global investment strategy on both the buy and sell side. He joined Smith & Williamson in September 2017, following 7 years as an in-house strategist for Hong Kong asset managers, Ajia Partners and RAYS Capital. Daniel had first moved to Asia to join Merrill Lynch as a Regional Equity Strategist in 2007, after spending 13 years at London-based global macro consultancy and asset allocation firm, Independent Strategy. Daniel is a Chartered Financial Analyst

Events raise the risk of inflation

Key historical events have influenced future inflation. The unprecedented pandemic-related policy response is an event that could lead to a turn up in the inflation cycle.

David Denton
Head of International Technical Sales

QUILTER INTERNATIONAL

David has spent three decades in the offshore wealth management industry, 20 of these with Quilter International and its predecessors, Old Mutual International and Royal Skandia. David trains and presents to professional and lay audiences world-wide, on the subject of wealth preservation, with an emphasis on the expatriate client, focusing on investments, pensions and property.

Financial Planning, COVID-19 and Glocalization

With many clients displaced by the current pandemic, and others clamouring for a fresh start overseas, he considers how insurance based investment solutions work best across multiple jurisdictions.

Webinar 5: Wednesday 10th November

Paul Forman
International Sales and Technical 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 gained in earlier roles with an international pension trustee and before that as regional sales manager for several leading offshore life offices. Away from the office Paul is a keen football fan and follows his local team Liverpool FC and also enjoys travel and trying to keep out of the bunkers and rough on the golf course.

Avoiding pension transfer pitfalls

The last 12 months has seen the introduction of new FCA legislation impacting the advice process with DB scheme pension transfers. At the same time, there has been a marked increase in 'anti-scam' rhetoric from ceding UK pension scheme trustees. During his talk, Paul will cover off some of the relevant matters to be aware of so that you and your clients enjoy a stress-free process and avoid any common pitfalls.

SYNOPSES AND SPEAKER DETAILS

Continued...Webinar 5: Wednesday 10th November

James Clark,
Head of Expatriate Sales (Europe)

UTMOST WEALTH SOLUTIONS

James Clark had over 20 years of experience across several roles at AXA Wealth in the UK prior to joining Utmost Wealth Solutions in 2016. In July 2019, James accepted a newly created role as Head of Expat Sales (Europe) to develop the Utmost Wealth Solutions proposition for expatriates where they have successfully launched products into Portugal and more recently France.

The importance of Ireland as a location for unit-linked life assurance when advising Expat clients

Over the past two decades, Ireland has emerged as one of the leading cross border life assurance jurisdictions. Ireland's success is driven by its position in the EU, giving access to EU markets, as well as a favourable corporation tax regime and a well-educated workforce.

In addition, there are some specific reasons why advisers recommend Irish unit-linked life assurance solutions over other jurisdictions.

Join James to learn more about the importance of Ireland as a location for unit-linked life assurance when advising Expat clients.

Andy Gwynn
Business Coach,
Speaker and Author

KEYNOTE PRESENTATION

Your Formula for Success

FEIFA members' favourite Andy Gwynn is back, with many new and developed ideas and strategies to make you more effective and productive. In this session, he will help you to: realise that you get what you focus on; understand the powerful formula to help you gain better results in both your business and private life; explore the idea that "your network = your net worth".

Andy is considered one of the most sought-after LinkedIn speakers, trainers and coaches in the UK, Europe and perhaps even the world. He is a leading business coach, speaker and author who has coached hundreds of company owners and corporate directors to greater profitability, financial freedom and successful relationships across their business and personal lives.

He has addressed audiences such as the Institute of Directors in the UK, and international audiences throughout Europe and as far afield as the USA and New Zealand. He is a master of business development, sales and marketing strategy and psychology. He has applied this approach to using LinkedIn (one of the most powerful and yet under-utilised tools in the world today) to help numerous businesses generate more sales, enabling clients to double and triple their businesses and, in one case, even assisted a client take their business from close to bankruptcy to selling for £1million in just 19 months.

SYNOPSES AND SPEAKER DETAILS

Webinar 6: Wednesday 17th November

David Docherty
Investment Director

SCHRODERS

David Docherty is Investment Director, Thematics at Schroders, responsible for the Global Transformation Range of thematic products and is a member of their Thematic Advisory Board. David managed UK equity portfolios from 1992 until 2019, working at Cazenove Capital from 2000 to 2013 prior to its acquisition by Schroders. David joined Schroders in 2013 and is based in London.

He previously worked at M&G and Gartmore where he was a UK equity fund manager and his investment career commenced in 1989 at Lloyds Investment Managers.

David holds a degree in History from Durham University and an MBA from Cranfield School of Management.

Investing today for tomorrow's world: thematic investing in a post-Covid world

David 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.

James Penny
UK Chief Investment Officer

TAM EUROPE ASSET MANAGEMENT

James Penny is TAM Europe's UK Chief Investment Officer. Prior to joining TAM Europe, James worked at UBS AG New York within the banks options trading division. UBS AG relocated him to their Investment Banking division headquartered in London where he specialised in both global equities and derivatives within the banks' growing Portfolio Trading Division.

James brings significant financial market experience to the investment team from a global career within one of the largest financial institutions in the world. A disciplined and methodological approach to global investing is one of the core themes James has instilled at TAM Europe.

Taking a look under the hood of a TAM ESG investment portfolio

TAM Europe's UK CIO, James Penny, will be providing an in-depth look at the funds within a TAM ESG portfolio. James will highlight some of the most unique and forward-thinking companies within the funds, reviewing their specific impact on ESG sectors and how they are performing against their mainstream counterparts.

The ESG market remains at the forefront of investing for a more sustainable future, and James will be looking at how these companies are affecting real, positive change.

SYNOPSES AND SPEAKER DETAILS

Webinar 7: Wednesday 24th November

Mark Brennan
Partner, Foresight Capital Management

VAM FUNDS

Mark Brennan is a Partner at Foresight Capital Management and a Co-Manager of the VAM Global Infrastructure Fund. He oversees £1.4bn of capital invested into listed real asset strategies and holds a Citywire Rating.

Prior to joining Foresight in 2017, Mark held a range of roles within the alternative investment space, including at Aberdeen Standard Investments and the UK Green Investment Bank.

VAM Global Infrastructure Fund

Mark will provide an overview of the global opportunity set available to investors in infrastructure and renewable energy, and an exploration of how allocating to these sectors can deliver attractive risk adjusted returns and increase the inflation-protection within portfolios.

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.

Tackling the ever changing retirement landscape

It comes as no surprise that the ongoing changes in the industry make navigating the retirement landscape a challenging task for advisers and consumers alike. With a focus on discussing the changes which have and are currently occurring in the industry, Craig will look at the way that pensions are evolving, and what this means for the decisions advisers and clients are making in regards of their retirement.

Keeping a close eye on the industry, iPensions are taking the pulse of the pension's sector to help understand the challenges advisers are experiencing when considering retirement options for clients.

SYNOPSES AND SPEAKER DETAILS

Continued... Webinar 7: Wednesday 24th November

Andy Gwynn
Business Coach,
Speaker and Author

KEYNOTE PRESENTATION

How to get more business from LinkedIn without being pushy or salesy

Andy Gwynn has unlocked the potential of LinkedIn for our members in the past, but in the last 12 months this business platform has arguably changed how it functions more than in any similar previous period. He will therefore cover: LinkedIn and how the world has changed since COVID; how to generate 1000’s of views of your posts and engage with your ideal client; how to utilise the “gold” that is LinkedIn Events and consistently attract hundreds of your ideal prospects to your webinars, seminars and other events.

Andy is considered one of the most sought-after LinkedIn speakers, trainers and coaches in the UK, Europe and perhaps even the world. He is a leading business coach, speaker and author who has coached hundreds of company owners and corporate directors to greater profitability, financial freedom and successful relationships across their business and personal lives.

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