

Agenda

Tuesday 4 June / etc. venues, 133 Houndsditch, London

innovate
2024 →

9:00 am – 9:30 am: Exhibition hall, light breakfast & networking

Time	Plenary session
9:30 am – 9:45 am	Intro & welcome Nadine Dereza
9:45 am – 10:55 am	intelliflo strategic update Nick Eatock The latest updates and news from intelliflo's CEO

10:55 am – 11:25 am: Exhibition hall, mid-morning refreshments & networking

Time	integrate	innovate	interact	ask the expert
11:30 am – 11:50 am	Digital strategy to engage your clients James Richards, intelliflo Jeff Lange, The Financial Advice Service This fireside chat will delve into the myriad of benefits of embracing a digital strategy. Explore how it can revolutionise your approach to offering financial advice and ignite growth.	wealthlink for your business Steve Rees, intelliflo Matt Townley, Suttons IFA Christopher Calvocoressi, SS&C Joe Harris, Alpha FMC Join Director, Joe Harris from Alpha FMC for a discussion on all things wealthlink alongside the team from intelliflo, SS&C and intelliflo customer, Matt Townley.	intelliflo connect – how intelliflo connect can help your team Steve Hoare, intelliflo & Alex Lannin, Westcotts Chartered Financial Planners & Anja Turvey, Salisbury House Wealth In this session our Learning and Development Manager, Steve Hoare, delves into first hand experiences of two valued customers, uncovering their utilisation of intelliflo connect and the benefits it delivers.	<p>Visit our ask the expert zone where you can get tailored advice to your questions, straight from the experts themselves!</p>
10 mins – room change				
12:00 pm – 12:20 pm	Retirement income – the changing landscape Johann Koch, intelliflo & Martin Lines, JUST Group intelliflo Chief Sales Officer Johann Koch, will be joined by Martin Lines, Development and Events Director, JUST Group, to discuss the evolving retirement market landscape and the innovation of guaranteed income solutions.	Business success planning – exit right Victoria Hicks – The Exit Partnership Chris Baigent-Reed – Jigsaw Tree Chris Baigent-Reed from consultancy Jigsaw Tree interviews Victoria Hicks, MD of the Exit Partnership about the different options for adviser firms considering their exit plans, now or in the future.	Protecting your business in the tech world Marc Pearce & Jason Adamson – intelliflo Neil Gallagher – Amazon Web Services (AWS) Jason Adamson our Chief Information Security Officer is joined by Marc Pearce from intelliflo and Senior Solutions Architect Neil Gallagher from AWS to delve into the critical topic of technology security and the collaborative efforts being taken to ensure your data is secure.	
10 mins – room change				
12:30 pm – 12:50 pm	Innovating investment solutions Lee Robertson, Octo Members & Thomas Hogg, Timeline Lee Robertson, the founder and CEO of Octo Members meets with Timeline's Head of Product, Thomas Hogg to explore the innovation of investment solutions between Timeline and intelliflo.	intelliflo innovations Roxanne Corrieri, intelliflo Learn more about intelliflo's latest and exciting innovations... more details to be revealed.	Operational wins to benefit your business and clients Wai-Jon Chan, intelliflo Steve Oakley, Astute Private Wealth Hear how one adviser firm has streamlined their operational processes across their technology to benefit their adviser team and clients and discover the benefits of streamlining your operations for your own business and clients.	

1:00 pm – 2:00 pm: Exhibition hall, lunch & networking

2:00 pm – 2:20 pm	The use of factor investing to enhance investment returns William Marshall, Hymans Robertson Hymans Robertson Investment Services CIO, William Marshall, will discuss the use of factor investing to enhance returns while managing cost and how this can deliver real value for retail clients.	Harnessing intelliflo office for seamless client cash integration Ryan Barnes, intelliflo Giles Hutson, Insignis Cash Giles Hutson, CEO of Insignis Cash talks about their automation of cash holdings for client portfolios through intelliflo office. Discover how this approach can streamline processes, ensuring maximum efficiency and client satisfaction.	AI and the changing roles within adviser firms today Natalie Beer, intelliflo Colette Noble, LIFT-Financial Colette Noble, Director of Strategy at LIFT-Financial discusses the integration of AI in the business operations and the transformative impact it's having on adviser, paraplanner and administrative roles.
10 mins – room change			
2:30 pm – 2:50 pm	What happens when you put clients first Natalie Holt, the lang cat & Chris Jones, Dynamic Planner Natalie Holt from the lang cat interviews Chris Jones from Dynamic Planner on the evolving landscape of how clients consume financial advice in today's world.	DFM vs MPS vs Multi Asset Funds in a changing market Damian Fantato, FT Adviser Ash Weston, 8AM Global & David Aujla, Invesco Damian Fantato is joined by Ash Weston and David Aujla to debate the value of DFM vs MPS vs Multi Asset Funds in light of Consumer Duty and a changing landscape.	Intergenerational wealth and new solutions for your business and clients Hope Coumbe, Professional Adviser, Andrew Kelly, Parker Kelly Financial Services, Jason McGuigan, Wren Sterling Hope Coumbe, Professional Adviser Editor will engage in a dynamic dialogue with intelliflo customers to explore the impact of inherited wealth and the innovative solutions tailored for advisers.
10 mins – room change			
3:00 pm – 3:20 pm	Cashflow Modelling for your clients Yasmin Trunks, intelliflo & David Barnes, Abrdn Yasmin Trunks, Senior Customer Manager at intelliflo, interviews David Barnes, Abrdn's Development Manager about their use of intelliflo's Cashflow Modelling and the key benefits for customers.	intelliflo innovations Roxanne Corrieri, intelliflo Learn more about intelliflo's latest and exciting innovations... more details to be revealed.	BI – The power of data Richard Wake & Darren Harding, intelliflo Gary Connolly, Ascot Lloyd The team from intelliflo share their latest Business Intelligence (BI) offering with valuable insights from Ascot Lloyd's Director of Analytics, Gary Connolly.

3:30 pm – 4:00 pm: Exhibition hall, afternoon refreshments & networking

4:00 pm – 4:10 pm	Welcome back Nadine Dereza
4:10 pm – 5:00 pm	Guest speaker Dave Coplin The rise of the humans – learning to thrive in the generative world of AI. In this session we will explore how you can help your organisation navigate an emerging world where dispersed employees, empowered with transformational tools such as generative artificial intelligence and other digital technologies will drive change across all aspects of their business in both the short and long-term. We'll look at the problems we will face, and the mistakes and assumptions we might make before ultimately focusing on how best you can help your organisation to harness the opportunity provided to deliver increasing value to both your clients and your people.
5:00 pm – 5:10 pm	Closing remarks Nick Eatock, CEO intelliflo

5:15 pm: Exhibition hall, refreshments & networking