

Agenda

innovate
2025 →

Tuesday 10 June / Convene Sancroft St Paul's, Paternoster Sq, London

Time	Adviser tech	Digital ecosystems	Strategic mindset	Tomorrow's world
8:45 am – 9:30 am	Kickstart your day: registration, breakfast and exhibitor showcase			
9:30 am – 10:30 am	Driving the future: intelliflo strategic updates Stay informed with the latest updates and news from our CEO, Nick Eatock. Discover insights, strategic directions, and exciting developments that are shaping the future of our industry.			
10:30 am – 11:00 am	The problem with people George Cliff (Clever IM) Join George Cliff of Clever Investment Management as he discusses the reasons people make poor investors and why processes and technology are the key to better investment outcomes.			
11:00 am – 11:30 am: Energise & connect – mid-morning refreshments, networking & exhibitor showcase				
11:30 am – 12 noon	intelliflo latest innovations Following on from our plenary session join intelliflo for an in-depth look at this key solution. Hear directly from our joint venture partner on stage and delve into the details.	Automation advantage – how digital ecosystems are transforming advice Chris Hudson (M&G) Rowan Whittington (Dynamic Planner) Sahar Nazir (Professional Adviser) How collaboration between established companies, M&G, Dynamic Planner and intelliflo is supporting Advisers to drive greater client engagement with their financial plans.	Retirement income: psychology, security and software solutions Dr Greg Davies (Oxford Risk) Martin Lines (JUST Group) Damian Fantato (Financial Adviser & Asset Allocator) How technology can help you to help your clients psychologically prepare for retirement and assess the retirement market options.	Join us for dynamic updates of more intelliflo innovations coming soon eAdviser for you — Tasks & workflows – the latest
12:15 pm – 12:45 pm	Cracking the code of client engagement Cathi Harrison (Verve) Charlotte Elgar (MHA Wealth) Richard To (Thorgmorton) Scott Millar (Finova Money) intelliflo customers discuss how they are utilising technology to effectively communicate with clients from initial engagement to relationship building.	Supercharge your ongoing advice compliance processes and reduce costs by over 50% Garry Evans (Recordsure) Jason Whintie (TCC) Ian Plumpton (Attivo) Cathy Davies (intelliflo) Attivo Case Study: Combining practical, effective regulatory expertise & proven AI.	Selling your business? 'Profit is King' Victoria Hicks (Melo) Rob Hudson (JUST Group (Destination Retirement)) Matt Jeffrey (Wavestone) Learn how firms can focus on profit within their business well in advance of any key change such as a future sale and explore options for handling non-profitable client segments.	Client portal enhancements — wealthlink – what's next?
12:45 pm – 2:00 pm: Refuel & network – lunch break, networking & exhibitor showcase				
1:15 pm – 1:45 pm	intelliflo 'Today's world' Paul Thomson-Clark (intelliflo) Kirsty Whitehouse (intelliflo) Matt Merchant (East Anglian Financial Planning) Discover the latest adviser lifecycle functionality for adoption today.			
2:00 pm – 2:30 pm	intelliflo video Kate McManus (intelliflo) James Richards (intelliflo) Lauren Kiley (TFAS Wealth) Hear about the launch of intelliflo video (powered by Money Alive) providing educational box sets and provider videos for your clients	Smarter, Faster, Better: How AI is Redefining Adviser Efficiency and Client Outcomes Joseph Twigg (Aveni) Thomas Hogg (Timeline) Lois Valley (Money Marketing) How AI is reshaping advice, challenging and reinventing job roles, investment decisions handling, redefining value and raising new questions for the future of financial advice.	Portfolio management in the current environment – how does US tech fit in? Ben Gutteridge (Invesco) Following the recent tariff-driven market shock, Ben explores the lessons learned and how portfolios might be best positioned, paying particular attention to the US tech sector which continues to dominate markets and lead global equity volatility.	'New look' portfolio reports — Data strategy
2:45 pm – 3:15 pm	Embracing wealthlink: transforming client engagement and connectivity Nick Barnes (intelliflo) Jane Hodges (Money Money Financial Planning) Nicholas Sinclair-Wilson (BRI Wealth Management) Oli Sussat (Harding Financial) Hear how wealthlink early adopters are leveraging the solution to address common business and client challenges	Hot Takes: Foster Denovo talk scaling advice with AI while battling spicy nuggets Alan Gurung (AdvisoryAI) Helise Chao (Foster Denovo) Gavin Bell (intelliflo) Hear how AI is helping financial advisers double their client capacity while reducing administrative time by up to 70%, enabling them to focus on what matters most: building relationships and delivering exceptional financial guidance.	Future-proofing your data: keeping AI and you honest Nicky Sevel (Woven Advice) Chirine Harb (Capital Asset Management) Ruth Lippaitt (Berry & Oak) intelliflo customers discuss how they are handling data cleansing to create the building blocks for their tech	Dynamic integrations — intelliflo connect updates
3:15 pm – 3:45 pm: Energise & connect – afternoon refreshments, networking & exhibitor showcase				
3:45 pm – 5:00 pm	Special guest speaker: Claire Williams Don't miss the chance to hear from Claire Williams, former Deputy Team Principal for the Williams Formula 1 team as she shares her incredible journey in the high-octane world of motorsport. Claire will delve into the secrets of building and leading a high-performance team, making strategic decisions under pressure, and embracing innovation to stay ahead of the competition.			
5:00 pm: Networking drinks – Let's toast to innovation, collaboration, and the exciting future of fintech!				