

Agenda

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

innovate
2024 →

9:00 am – 9:45 am: Exhibition hall, light breakfast & networking

Time	Plenary session
9:45 am – 9:55 am	Intro & welcome Nadine Dereza
9:55 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	intelliflo connect – how intelliflo connect can help your team Steve Hoare, intelliflo & Alex Lannin, Westcotts Chartered Financial Planners & Anja Turvey, Salisbury House Ltd 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.	wealthlink for your business James Bartlett & Steve Rees, intelliflo Christopher Calvocoressi, SS&C Joe Harris, Alpha FMC Join Senior Manager, Joe Harris from Alpha FMC for a discussion on all things wealthlink alongside the team from intelliflo and SS&C.	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.	<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	Adviser and client education for a new generation Johann Koch, intelliflo & Martin Lines, JUST Group intelliflo Chief Sales Officer Johann Koch, will be joined by JUST Group PLC to discuss the evolving retirement market landscape and the innovation of guaranteed income solutions.	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 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.	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.		
10 mins – room change					
12:30 pm – 12:50 pm	Intergenerational wealth and new solutions for your business and clients Hope Coumbe, Professional Adviser 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.	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.	Operational wins to benefit your business and clients 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 Solutions 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.	To be announced soon
10 mins – room change			
2:30 pm – 2:50 pm	AI and the changing roles within adviser firms today Natalie Beer, intelliflo & Colette Noble, LIFT Financial Group 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.	DFM vs MPS vs Multi Asset Funds in a changing market Damian Fantato, FT Adviser Ash Weston, 8AM Global & David Aujla, Invesco Damian Fantato, Deputy Editor at FT Adviser, is joined alongside Ash Weston, Head of Managed Portfolio Services and Invesco's Multi Asset Fund Manager, David Aujla – where they will be debating the value of DFM vs MPS vs Multi Asset Funds in light of Consumer Duty and a changing landscape.	What happens when you put clients first Natalie Holt, the lang cat & Chris Jones, Dynamic Planner The Lang Cat interviews Dynamic Planner on the evolving landscape of how clients consume financial advice in today's world.
10 mins – room change			
3:00 pm – 3:20 pm	MI – The Power of Data Richard Wake & Darren Harding, intelliflo Gary Connolly, Ascot Lloyd The team from intelliflo share their latest Management Information (MI) offering with valuable insights from Ascot Lloyd's Director of Analytics, Gary Connolly.	intelliflo innovations Roxanne Corrieri, intelliflo Learn more about intelliflo's latest and exciting innovations... more details to be revealed.	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.

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

4:00 pm – 4:10 pm	Welcome back Nadine Dereza
4:10 pm – 4:45 pm	Guest speaker Dave Coplin With over 25 years of experience, Dave has been a guiding force for organisations and governments worldwide, helping them embrace transformational technology for enduring growth and market relevance. Passionate about Artificial Intelligence and Robotics, Dave is a leading voice on the future of work, education, privacy, online safety, and the profound impact of revolutionary technologies such as Machine Learning and Artificial Intelligence. Don't miss this opportunity to hear from a visionary thought leader.
4:45 pm – 5:00 pm	Closing remarks Nick Eatock, CEO intelliflo

5:00 pm: Exhibition hall, refreshments & networking