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RESEARCH IN FINANCE

# 2020 Event Pack

Professional Paraplanner

Technical Insight Seminars

Professional Paraplanner Technical Insight Seminars

Professional Paraplanner launched its first Technical Insight Seminar on 9 June 2015 at the Grange St Paul's Hotel, London. In 2019 we ran 15 events across the UK from London, Manchester, Edinburgh, Birmingham to Exeter and Southampton. We have hosted close to 800 paraplanners! **2020 will be even bigger!**

**The investment and savings environment makes for a challenging backdrop to our seminars, which to gives paraplanners structured educational material from some of the best names in the industry.**

As well as hearing from our speakers offering technical insights and strategic views on the trends and issues in the market, the more intimate nature of the seminar format means paraplanners can question and discuss matters with the speakers either during or after their presentations.

**For 2020 we are extending the event programme to meet the delegate demand adding Colchester to the roster.**

We are looking for new partners to bring even more depth to continue to educate this influential segment of the market.


Professional Paraplanner is extending its event programme in 2020 after feedback from paraplanners. Following extensive research and consultation with the paraplanning community, an agenda is carefully crafted to offer the most relevant and appealing content for this highly influential part of the advice chain.

The format for each event will includes plenary sessions mixed in with a series of focussed boardroom sessions. Each session is 40 minutes plus a Q&A and qualifies for structured CPD.

The events include panel debates and independent speakers, networking breaks and lunch.

These are full day events will cover some of the following topics and themes – sponsors may suggest topics which we can test with a sample of the audience in advance:

- Retirement – new retirement options; pensions transfers; income generation in retirement planning.
- Tax planning – trusts in estate planning; IHT; trust taxation, taxation of investment bonds; LTA testing; residence nil rate band, death benefits.
- Investment – risk profiling; market views; the quest for income; ETFs; portfolio building; DFM v Multi-Manager; DFM due diligence; active allocation to help navigate volatile markets. ESG
- Technology – cashflow planning; platform due diligence; fund research tools.
- Regulation - core elements of the financial advice process and highlighting new examples from the regulator of good and poor practice.
- Exam preparation and study tips

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# A Paraplanner’s view of our events:

Jay Dhaliwal DipPFS BSc • 1st
Paraplanner at Wesleyan
2w

Had a productive day attending seminars and networking at the Professional Paraplanner event in Nottingham yesterday!

Guest speakers: Cathi Harrison @ Para-Sols, Andrew Denham-Davis @ Brooks Macdonald, Rory Percival, Paul Squirrell @ FundsNetwork, and Matthew Parlour @ Invesco Ltd.

If you are interested in online webinars, attending future events, signing up for the newsletter or would like further information, please visit: https://lnkd.in/gJz2rvZ
#networking #paraplanning #newsletters


40 Likes · 2 Comments

*“This year’s Technical Insight Seminar was great. I attended last year and this year’s event was even better. I love the structure of the event how you get split into smaller groups for the presentations throughout the day, it feels more personal and it is easier to interact with the presenters as well as others in the group. The sessions are just the right length of time, often making them short and snappy therefore keeping you engaged throughout.”*

*“The York seminar was the best CPD event I've attended all year! Great content, interesting speakers, great venue (the food was awesome!) - I took away pages of notes and ideas. I can't wait for next years!”*

*“I liked that you arranged the event in a regional centre rather than relying on London or Birmingham. It was well organised and gave me much to think about. Thank you.”*

*“The overall day was excellent. It made a refreshing change to see such a mix of males and females of varying ages (much different to the usual events I attend). Every session was informative and gave me a wealth of ideas to take away and implement within our business. I would and will highly recommend future events to my colleagues.”*

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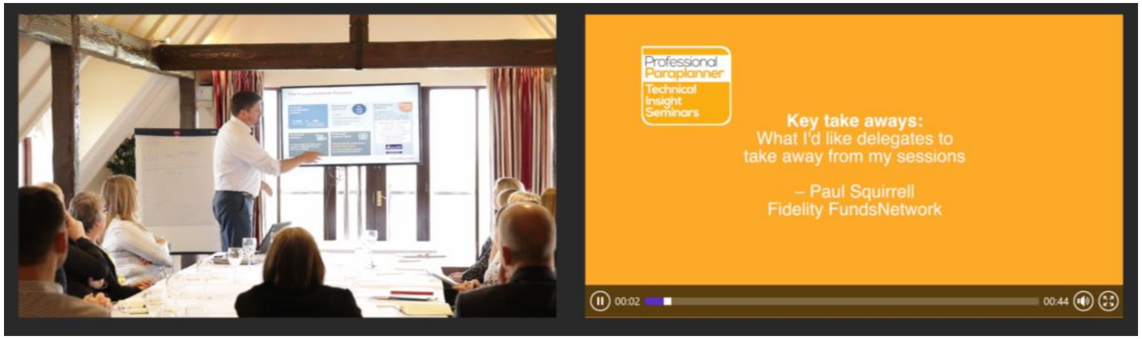
# Extended marketing opportunities:






# 2020 Schedule:

**29TH APRIL EXETER, WOODBURY PARK**

**13TH MAY BIRMINGHAM, CROWNE PLAZA**

**20th MAY NORWICH**

**10TH or 11TH JUNE LONDON**

**17TH JUNE CARDIFF, THE VALE RESORT**

**9TH JULY SOUTHAMPTON, HILTON AT THE AGEAS BOWL**

**22ND JULY CHESTER, DOUBLE TREE HILTON**

**9th SEPTEMBER NOTTINGHAM, NOTTINGHAM BELFRY**

**23RD SEPTEMBER GLASGOW, HILTON GLASGOW**

**24TH SEPTEMBER EDINBURGH, WALDORF ASTORIA**

**8TH OCTOBER LEEDS, OULTON HALL**

**21ST OCTOBER MANCHESTER, MIDLAND HOTEL**

**4TH NOVEMBER READING, CROWNE PLAZA**

**18TH NOVEMBER BRISTOL, AZTEC HOTEL**

**25TH NOVEMBER NEWCASTLE, CROWNE PLAZA**

**2ND DECEMBER COLCHESTER, COLCHESTER FC**

# Example firms represented at our events

| Exeter | Birmingham | London | Edinburgh |
|---|---|---|---|
| 1st Financial Group | Aquarius Wealth Management | 1825 | 336 Financial Management |
| Arbuthnot | Arrow Financial Services | Acumen Finanical Planning | Acumen Financial Planning Limited |
| Bishop Fleming | AYCE Planning | Altorfer Financial Management Ltd | Affinity IFA Ltd |
| Bishop Fleming IFA | Beyond Financial Limited | Black & White Financial Planning | Anderson Strathern Asset Management |
| Boevallon Wealth Management | BKD Wealth Management Ltd | Black Swan Capital Ltd | Botanic Financial |
| Brewin Dolphin | Blackstone Wealth Management | Brewin Dolphin | Brewin Dolphin |
| Cathedral Financial Management Ltd | Brewin Dolphin | CBW Financial Planning | Brown Shipley |
| Cherry May Financial Planning Ltd | Cameron and Company Financial Planning Ltd | Chancery FP | Cailean Ltd |
| Chetwood Wealth Management | Capital Wealth Research Consultancy Limited | Chiltern Financial Services | Capital Risk Management Ltd |
| Compass Wealth Management | Close Brothers Asset Management | Close Brothers Asset Management | Carbon Financial Partners Ltd |
| Concise Wealth Management Ltd | Cooper Parry Wealth | Coloma Wealth Management | Charles Stanley |
| Fortic Financial Services Ltd | CWP | Cooper Parry Wealth | Chiene + Tait Financial Planning Ltd |
| Francis Clark Financial Planning Ltd | DSCF Consulting Ltd | Creaseys Wealth | Close Brothers |
| Grant Mitchell Paraplanning | Fortitude Financial Planning Ltd | Desire Wealth Management | County Capital Wealth Ltd |
| IFA Choice Ltd | Henwood Court Financial Planning Ltd | EC Financial Services Ltd | Full Moon Analysis |
| Medical & General IFA | Investec Wealth & Investment Limited | EQ Investors | GRC Financial Management Limited |
| Merchants Wealth Management Ltd | Keeley & Co | Fleet Street Financial | Henderson Loggie Financial Services Ltd |
| Priscum Ltd | Kingsley Financial Planning | Holden & Partners | Innovate FS Ltd |
| Professional Financial Partnerships Ltd | KLO Financial Services | Hughes & Co | Johnston Carmichael Wealth Ltd |
| Seabrook Clark | Lee Strathy Limited | Hyperion Financial Planning | KPMG |
| Shipman Financial Planning | Mackenzie Taylor | Informed Choice Financial Planning | Mearns & Company |
| Sound Financial Management Limited | Margetts Wealth Management | Lime Outsourced Paraplanning | Paraworks |
| Thomas & Gentry IFA Ltd | MPA Financial Management | London & Capital | Rathbones |
| Tilney Financial Planning | Newton EP | London Wall Partners LLP | Retirement & Investment Solutions Ltd |
| | Perspective Financial Management | Lothbury Paraplanning Services | Russell Gibson Financial Management |
| | Prosperity Wealth Ltd | NLP Financial Management | Savvy Paraplanning Limited |
| | Simpson Financial Services | Origen Financial Services Ltd | Strategic Asset Managers Ltd |
| | Smith Cooper IFS | Plan Work | Thorntons Investments |
| | Succession Group Ltd | Potter and Ford | Tilney |
| | Tavistock Investments | Prosperity IFAs | Verus Financial Planning |
| | The Penny Group | S4 Financial ltd | VWM Wealth |
| | Vintage | Slone Capital | |
| | Wealth Solutions | St. James's Place | |
| | Wealth Wizards | Tarvos Wealth | |
| | Wesleyan Financial Services | The Paraplanners | |
| | Wise Investment | Thomas Miller Investment | |
| | Your Paraplanner Ltd | Wardour Partners | |
| | | WH Ireland Ltd | |

## Example programme

### Event Schedule – 13th June 2019 – Leonardo Royal St. Paul's Hotel, London

| | | | | | |
|---|---|---|---|---|---|
| **8.30am – 9.00am** | **Registration – Refreshments & Pastries** | | | | |
| 9.00am – 9.05am | **Introduction and welcome by Rob Kingsbury of Professional Paraplanner – Milton Suite** | | | | |
| 9.05am – 9.50am | **Paul Kennedy, FundsNetwork, Tales of the unexplained & pension conundrums 'one step beyond…' – Milton Suite** | | | | |
| | **Reynolds** | **Johnson** | **Cornwallis** | **Compton** | **Pepys** |
| 09.55am – 10.40am | Cathi Harrison<br>The Art of Suitability Report Writing Part II | Graham Finlay<br>BMO<br>Generating Income in retirement | FundsNetwork<br>Paul Squirrell<br>Taking a closer look at the State Pension | Octopus<br>Victoria Barber & Tom Wood<br>Peer to Peer – what is it and where does it fit in client portfolios? | Stephen McPhillips<br>Dentons<br>SIPP and SSAS - exit planning opportunities and the importance of continued due diligence |
| 10.45am – 11.30am | Stephen McPhillips<br>Dentons<br>SIPP and SSAS - exit planning opportunities and the importance of continued due diligence | FundsNetwork<br>Paul Squirrell<br>Taking a closer look at the State Pension | Cathi Harrison<br>The Art of Suitability Report Writing Part II | Graham Finlay<br>BMO<br>Generating Income in retirement | Octopus<br>Victoria Barber & Tom Wood<br>Peer to Peer – what is it and where does it fit in client portfolios? |
| **11.30am – 11.45am** | **Refreshment Break & Networking** | | | | |
| 11.50am – 12.35pm | FundsNetwork<br>Paul Squirrell<br>Taking a closer look at the State Pension | Octopus<br>Victoria Barber & Tom Wood<br>Peer to Peer – what is it and where does it fit in client portfolios? | Stephen McPhillips<br>Dentons<br>SIPP and SSAS - exit planning opportunities and the importance of continued due diligence | Cathi Harrison<br>The Art of Suitability Report Writing Part II | Graham Finlay<br>BMO<br>Generating Income in retirement |
| 12.40pm – 1.25pm | Octopus<br>Victoria Barber & Tom Wood<br>Peer to Peer – what is it and where does it fit in client portfolios? | Stephen McPhillips<br>Dentons<br>SIPP and SSAS - exit planning opportunities and the importance of continued due diligence | Graham Finlay<br>BMO<br>Generating Income in retirement | FundsNetwork<br>Paul Squirrell<br>Taking a closer look at the State Pension | Cathi Harrison<br>The Art of Suitability Report Writing Part II |
| **1.25pm – 2.05pm** | **Lunch & Networking** | | | | |
| 2.10pm – 2.55pm | Graham Finlay<br>BMO<br>Generating Income in retirement | Cathi Harrison<br>The Art of Suitability Report Writing Part II | Octopus<br>Victoria Barber & Tom Wood<br>Peer to Peer – what is it and where does it fit in client portfolios? | Stephen McPhillips<br>Dentons<br>SIPP and SSAS - exit planning opportunities and the importance of continued due diligence | FundsNetwork<br>Paul Squirrell<br>Taking a closer look at the State Pension |
| 3.00pm – 5.00pm | **Professional Paraplanner Awards in Association with Parmenion – Milton Suite** | | | | |

## Event Overview

- 25 – 100 carefully selected paraplanners at each venue
- Max 6 sponsors
- Full day conference
- Networking breaks

## Sponsors include

## Sponsorship Opportunities

- **Boardroom Speaking Slot – sponsor to facilitate a 40 minute interactive session with a selection of delegates plus Q&A (on rotation)**
- **2 sales passes and speaker pass**
- **Promotion and branding on all associated event materials and signage**
- **Full delegate list inc email following the seminars**
- **Feedback report from delegates**
- **Event coverage in magazine**
- **Video promo of your session**

- Cost £7,500 (+VAT) per event or £95,500 (+VAT)
- Plenary option on request and volume discounts apply

# CONTACT DETAILS

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