

The Confidence Factor: how empowering customers to make smarter financial decisions can lead to competitive advantage.



Special guest compere
Declan Curry

Agenda

08:30 – 09:30 Breakfast and networking

09:30 – 09:50 Welcome from **John Milliken**, CEO, Defaqto, introduced by **Declan Curry**

09:50 – 10:30 KEYNOTE: The psychology of financial decision-making
Neil Bage, Founding Partner at Shaping Wealth and CEO of Neurofi Intelligence

10:30 – 11:00 PANEL DISCUSSION: Digital and AI integration: what does it mean for the customer experience?
Facilitated by **Declan Curry**

11:00 – 11:15 Coffee break

11:15 – 11:45 PANEL DISCUSSION: Making the value case: how to better communicate, evidence and enhance product value, especially for customers who never make a claim.
Facilitated by **TBC**

OR PRODUCT UPDATE: Defaqto In Focus: Exploring Adviser behaviour and trends across wealth products and MPS
Andy Parsons, Defaqto

11:45 – 12:15 PRODUCT UPDATE: Matrix 360: one year on from last year's launch, what's new and coming?
Sam Leonard-Williams, Defaqto

OR KEYNOTE: Retirement reforms in focus: pension and policy shifts.
Renny Biggins, Head of Retirement, TISA UK

12:15 – 12:45 MARKET UPDATE: Confidence in the age of complexity
Alex Ward-Booth, Director, Savanta

12:45 – 13:30 Lunch

13:30 – 13:50 KEYNOTE: Geopolitical Snapshot: a business broadcaster's view
Declan Curry

13:50 – 14:00 PRODUCT UPDATE: The Defaqto Difference
Sally Boyle, Defaqto

14:00 – 14:40 RATINGS UPDATE:
Star Ratings 2026
General Insurance and Banking

OR RATINGS UPDATE: Diamond Ratings and NEW Emerging Diamonds
Asset Managers and IFAs

OR RATINGS UPDATE: Star and Service Ratings 2026
Wealth and Protection Provider

14:40 – 14:50 Quick coffee break + reconvene

14:50 – 15:20 KEYNOTE: Hidden in plain sight: overlooked shifts that could move market
Justin Ibbett, Founder & CEO, Focaldata

15:20 – 15:30 Golden Ticket prize draw

15:30 – 16:00 Insurer of the Year Awards 2025 Prizegiving

16:00 – 16:50 Networking and drinks



Specialist sessions for
Advisers and Wealth & Protection Providers