Defaqto Autumn Adviser Conference

The new rules of wealth, investment and retirement: 2027 and beyond

Wednesday, 11 November **British Motor Museum, Warwick**

TIME	SESSION	FORMAT
09:15 – 10:00	**Registration, coffee and networking**	
10:00 – 10:15	**Welcome and company overview** Andy Parsons, Head of Insight,, Defaqto	Opening address
10:15 – 10:45	**Man Group** Henry Neville	Presentation
09:45 – 11:15	**W1M** Nersen Pillay	Presentation
11:15 – 10:35	**Coffee break**	
11:35 – 12:05	**Premier Miton** David Jane	Presentation
12;05 – 12:35	**Standard Life** Mark Baldwin	Interview
12:35 – 13:05	**Adviser training** Chris Larkin, Big Rock	Training session
13:05 – 13:50	**Lunch**	
13:50 – 14:20	**Adviser training: the results** Chris Larkin, Big Rock	Training session
14:20 – 14:50	**Tax Advantaged investing** Nick Priest, Downing | Nick Maidment, Freyr | Caroline Flagg, PXN	Panel discussion
14:50 – 15:20	**Defaqto Unity**	Presentation
15:20 – 15:40	**Coffee break**	
15:40 – 16:10	**Closing keynote** Liz McConaghy, RAF Pilot	Keynote
16:10 – 17:00	**Free time to explore the Museum**	

With major pension and inheritance tax reforms due in April 2027, alongside an evolving political and economic environment, now is the time to prepare.

Find out more and register here: https://www.defaqto.com/adviser-conference-2026

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