

From volatility to value

Rethinking propositions to deliver optimised client outcomes



AGENDA

08:30 – 09:20	Breakfast and networking
09:20 – 09:30	Welcome from John Milliken , CEO, Defaqto , introduced by Sally Boyle , CSO, Defaqto
09:30 – 10:00	OPENING KEYNOTE: 2025-2035: The defining decade? Graeme Leach , Global Chief Economist
10:00 – 10:30	INVESTMENT UPDATE: Investment Lessons from 17 years of Fundhouse Research Rory Maguire , CEO/Founder, Fundhouse
10:30 – 11:00	Coffee break
11:00 – 11:30	INVESTMENT UPDATE: Multi-asset investing in MPS and multi-asset funds Ben Gilbert , Investment Manager, Sarasin & Partners
11:30 – 12:00	INVESTMENT UPDATE: MPS under the microscope Andrew Miller , Lead Investment Director, Quilter
12:00 – 12:30	INVESTMENT UPDATE: How platforms make it easier to run your CIP Ross Easton , Head of Platform Propositions, Scottish Widows
12:30 – 13:25	Lunch and product demos
13:25 – 13:40	PRODUCT UPDATE: Defaqto Adviser Proposition Sally Boyle , Chief Sales Officer, Defaqto
13:40 – 14:10	DEFAQTO INSIGHTS: Multi-asset funds and MPS, with the Defaqto Insights team Facilitated by Mike Turner , Investment Development Consultant, Defaqto
14:10 – 14:40	FIRESIDE CHAT: Mark Keogh , Head of Asset Management, Blackfinch Paul Tinkler , Insight & Consulting Director, Defaqto
14:40 – 15:20	PANEL DISCUSSION: Outsourced Investment Panels - facilitated Mike Turner , Investment Development Consultant, Defaqto <ul style="list-style-type: none">• Nick Davis, Oakglen Wealth• Karl Heap, Brooks Macdonald• Simon Morris, Premier Miton
15:20 – 15:45	Coffee break
15:45 – 16:15	KEYNOTE: The real value of risk The Right Honourable Tom Tugendhat , MBE VR MP
16:15 – 16:25	Closing remarks from John Milliken

EXPERT INSIGHT. PERFECT TIMING.

Don't miss your opportunity to put questions to our expert guests, the day after the Autumn Budget.



Graeme Leach
Global Economist



The Right Honourable
Tom Tugendhat
MBE VR MP

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