

Clarity today. Confidence tomorrow.

08:15 – 09:00	Breakfast and networking
09:00 – 09:15	WELCOME: Sally Boyle, Chief Sales Officer, Defaqto
09:15 – 09:45 ★	OPENING KEYNOTE: Paul Craven, Behavioural Economics Expert
09:45 – 10:15	INVESTMENT UPDATE: Risk resilience and opportunity: the shifting sands of financial markets — Paul Byrne, Quantitative Analyst and Portfolio Manager, Quantitative Equity Team, BNY Investments
10:15 – 10:45	INVESTMENT UPDATE: Investing in a new world order, Quilter — Stuart Clark, Portfolio Manager — Helen Bradshaw, Portfolio Manager, Quilter
10:45 – 11:10	Coffee break
11:10 – 11:40	INVESTMENT UPDATE: Safeguarding retirement plans with a smoothed approach — Ed Green, Investment Specialist, M&G
11:40 – 12:10	INVESTMENT UPDATE: Building growth portfolios with fewer decisions, — Lucy Haddow, Investment Specialist, Baillie Gifford
12:10 – 12:35	FIRESIDE CHAT: Andy Parsons Interviews Samantha Pardoe, Distribution and Partnership Development Manager, Standard Life on Evolving Retirement Needs and Provider Solutions
12:35 – 13:35	Lunch and product demos
13:35 – 14:00	DEFAQTO INSIGHTS: Mike Piddock, Chief Customer Officer, Defaqto
14:00 – 14:40	PANEL SESSION 1: Tax Advantaged - hear from Green Angel, Puma and TIME. Facilitated by Mark O'Donnell, Insight Manager, Defaqto
14:40 – 15:20	PANEL SESSION 2: MPS - hear from Bordier, Brooks MacDonald, King and Shaxson. Facilitated by Mike Turner, Investment Development Consultant, Defaqto
15:20 – 15:45 ★	Coffee break
15:45 – 16:20	KEYNOTE: Mark Foster, Olympic Swimmer and Broadcaster
16:20 – 16:25	Closing remarks from Andy Parsons

★ Elite guest keynote speakers



Paul Craven
Behavioural
economics expert



Mark Foster
Olympic swimmer
and broadcaster

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