

# Clarity today. Confidence tomorrow.

08:15 – 09:00	Breakfast and networking
09:00 – 09:15	WELCOME: <b>John Milliken</b> , CEO, <b>Defaqto</b>
09:15 – 09:45	★ <b>OPENING KEYNOTE: Paul Craven</b> , Behavioural Economics Expert
09:45 – 10:15	<b>INVESTMENT UPDATE:</b> Risk resilience and opportunity: the shifting sands of financial markets — <b>Bhavin Shah</b> , Portfolio Manager, <a href="#">BNY Investments</a>
10:15 – 10:45	<b>INVESTMENT UPDATE:</b> Investing in a new world order — <b>Stuart Clark</b> , Portfolio Manager, <a href="#">Quilter</a>
10:45 – 11:10	Coffee break
11:10 – 11:40	<b>INVESTMENT UPDATE: M&amp;G</b> — <b>Ed Green</b> , Investment Specialist, <a href="#">M&amp;G</a>
11:40 – 12:10	<b>INVESTMENT UPDATE:</b> Building growth portfolios with fewer decisions, — <b>Lucy Haddow</b> , Investment Specialist, <a href="#">Baillie Gifford</a>
12:10 – 12:35	<b>FIRESIDE CHAT:</b> — <b>Samantha Pardoe</b> , Distribution and Partnership Development Manager, <a href="#">Standard Life</a>
12:35 – 13:35	Lunch and product demos
13:35 – 14:00	<b>DEFAQTO INSIGHTS: Sally Boyle</b> , Chief Sales Officer, <b>Defaqto</b>
14:00 – 14:40	<b>PANEL SESSION 1:</b> hear from <b>Green Angel, Puma</b> and <b>TIME</b> . Facilitated by <b>Mark O'Donnell</b> , Insight Manager, <b>Defaqto</b>
14:40 – 15:20	<b>PANEL SESSION 2:</b> hear from <b>Bordier, Brooks MacDonald, King and Shaxson</b> . Facilitated by <b>Mike Turner</b> , Investment Development Consultant, <b>Defaqto</b>
15:20 – 15:45	Coffee break
15:45 – 16:20	★ <b>KEYNOTE: Mark Foster</b> , Olympic Swimmer and Broadcaster
16:20 – 16:25	Closing remarks from <b>Andy Parsons</b>

## ★ Elite guest keynote speakers



**Paul Craven**  
Behavioural  
economics expert



**Mark Foster**  
Olympic swimmer  
and broadcaster

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