

# Clarity today. Confidence tomorrow.

08:15 – 09:00	Breakfast and networking
09:00 – 09:15	WELCOME: <b>Sally Boyle</b> , Chief Sales Officer, <b>Defaqto</b>
09:15 – 09:45	★ OPENING KEYNOTE: <b>Paul Craven</b> , Behavioural Economics Expert
09:45 – 10:15	INVESTMENT UPDATE: 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	INVESTMENT UPDATE: Investing in a new world order, <a href="#">Quilter</a> — <b>Stuart Clark</b> , Portfolio Manager — <b>Helen Bradshaw</b> , Portfolio Manager
10:45 – 11:10	Coffee break
11:10 – 11:40	INVESTMENT UPDATE: Safeguarding retirement plans with a smoothed approach — <b>Ed Green</b> , Investment Specialist, <a href="#">M&amp;G</a> — <b>Jamie Drewett</b> , Head of Intermediary Sales, <a href="#">Scottish Widows</a>
11:40 – 12:10	INVESTMENT UPDATE: Building growth portfolios with fewer decisions, — <b>Lucy Haddow</b> , Investment Specialist, <a href="#">Baillie Gifford</a>
12:10 – 12:35	FIRESIDE CHAT: <b>Andy Parsons</b> Interviews <b>Samantha Pardoe</b> , Distribution and Partnership Development Manager, <a href="#">Standard Life</a> on Evolving Retirement Needs and Provider Solutions
12:35 – 13:35	Lunch and product demos
13:35 – 14:00	DEFAQTO INSIGHTS: <b>Mike Piddock</b> , Chief Customer Officer, <b>Defaqto</b>
14:00 – 14:40	PANEL SESSION 1: Tax Advantaged - hear from <b>Green Angel</b> , <b>Puma</b> and <b>TIME</b> . Facilitated by <b>Mark O'Donnell</b> , Insight Manager, <b>Defaqto</b>
14:40 – 15:20	PANEL SESSION 2: MPS - hear from <b>Bordier</b> , <b>Brooks MacDonald</b> , <b>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	★ KEYNOTE: <b>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

## Thank you to our headline sponsors

**Baillie Gifford™**

➤ **BNY** | INVESTMENTS



Scan here for more  
details and to RSVP



*Longer lives, faster change and more demanding clients. How can you deliver smarter financial decisions in a shifting advice landscape?*