

- How is your business adapting to meet the consumer demand for help, guidance and advice?
- How can DIY models offer customers more help? How can we scale traditional financial advice?

13:30 - 14:00 Registration

Section One: Changing Business Models



14:00 - 14:15 Framing the discussion - what advice do customers want?

Holly Mackay, CEO of **Boring Money**

Holly will talk us through a market update.

What advice do customers actually want and value? Who is offering help and doing a good job?

14:15 - 14:45 How are established provider brands responding to the evolving advice model?

Distributors are moving back into advice. How do these brands see digital advice?

How can the DIY market evolve to offer more useful help, and what has customer response been?

Ed Dymott, MD Transformation, Innovation and Growth at **Aegon**

Nicholas Johnson, Investment Journey Lead at **Coutts & Co**

Jamie Bullock, Head of Customer, Proposition & Commercial - End Investor, at **Fidelity**

14:45 - 15:25 How will 'traditional advice' play into new hybrid models?

Robert Caplan Financial Planning Director of **First Wealth**

Stephen Coates, Principal Consultant at **Mercer**

Jessica Miller, Head of Proposition & Product at **Schroders Personal Wealth**

Helena Wardle, Chartered Financial Planner at **Sterling and Law**

15:25 - 16:00 Coffee Break

Section Two: Implementing Change



16:00 - 16:35 Q&A - The grey area between guidance & advice

Louis Petherick, Chief Risk Officer at **AJ Bell**

Philip Deeks, Director of Financial Services Risk and Regulatory Insight Centre, at **KPMG**

16:35 - 17:25 What should and could good look like? From app to advice.

We take component parts to create a modern customer journey. From app to aggregation to advice.

Gemma Steel, General Counsel and Head of Financial Products at **Dozens**

Dean Butler, Head of Digital Strategy at **M&G**

Samantha Seaton, CEO of **Moneyhub**

Andrew Firth, Founder & CEO, **Wealth Wizards**

17:25 - 17:45 Closing Thoughts

Holly Mackay, CEO of **Boring Money**

17:45 - 19:00 Join us for drinks

Partnered by   **WealthWizards**



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Ticket Prices - £199 + VAT

