



**THE**  
**FINANCIAL**  
**PLANNING**  
**CONFERENCE**  
**2023**

**3 - 4 October**  
Wotton House, Surrey

[cisi.org/fpc23](https://cisi.org/fpc23)

[#financialplanning23](https://twitter.com/financialplanning23)

## Monday 2 October 2023: Pre-conference activities (Deluxe Pass only)

10:00 - 14:30 **Golf and light lunch at Betchworth Park Golf Club**

15:30 - 17:30 **Visit to Gin Kitchen, an artisan distillery creating award-winning luxury spirits**

## Tuesday 3 October 2023: Conference

10:00 - 11:30 **Registration, coffee and networking**

Workshop: Ethics  
(The Old Library)

Workshop: Biases  
(Wotton Suite)

11:40 - 12:40 **Integrity at work**

Kevin Moore, Chartered FCSI,  
Director Global Business  
Development, CISI

**Behavioural finance sucks: Discuss**

Chris Budd, Founder, Institute for Financial  
Wellbeing

Dr. Moira Somers, Psychologist, Family Wealth  
Consultant and Executive Coach

12:40 - 13:40

**Lunch**

**Explore the Tech Hub and meet the sponsors**

13:40 - 13:50

**Welcome address**

Tracy Vegro OBE, Chief Executive, Chartered Institute for Securities & Investment

13:50 - 14:30

**Opening keynote: What is resilience and how we can achieve it?**

Professor Steve Peters, consultant psychiatrist, bestselling author and CEO

Steve has written four books including the bestselling self-help book of all time in the UK, 'The Chimp Paradox'. He is the CEO of Chimp Management and has been a consultant to over 20 Olympic and national sporting teams including Liverpool FC, British Cycling, GB Taekwondo, England Rugby and England Football. Steve will use neuroscience to discuss how the mind is structured and functions, challenging you to consider how you manage your psychological health.

14:30 - 15:10

**'Playing office' and 'head trash' knows no borders**

Matthew P. Jarvis CFP®, Co-Founder, The Perfect RIA and President, Jarvis Financial

Playing office costs on average 3-6 MONTHS each year, but just a handful of simple (but difficult) hacks can buy back all this time and more. Matthew will share these plus his advice for replacing head trash ("I don't have enough clients" and/or "I don't have enough clients") with extreme accountability.

Based in Seattle, Matthew has literally written the book on how to Deliver Massive Value™. His intense focus on delivering value and spending quality time outside of the office with his family, all while being highly profitable, has catapulted Matthew into the global league of extraordinary financial planners. Today, he is sought-after for his no-nonsense, albeit controversial, tactics to maximise efficiency. He co-hosts The Perfect RIA podcast.

15:10 - 15:40

**Coffee and networking**

	<b>Workshop: Sustainability (The Old Library)</b>	<b>Workshop: Fraud and financial abuse (Wotton Suite)</b>
<b>15:40 - 16:10</b>	<p><b>Sustainability at the heart of our business and as the driver of your investments</b></p> <p>Julia Dreblow, Sustainable Investment Specialist, SRI Services Director</p>	<p><b>Spotting fraud and financial abuse: Professional tactics used to separate the lies from the truth</b></p> <p>Michelle Hoskin, Managing Director, Standards International</p>
<b>16:10 - 16:20</b>	<b>Refreshment break</b>	
<b>16:20 - 16:25</b>	<b>Financial Advice Business Benchmarks 2023 – What’s next for advice firms?</b>	
	Heather Hopkins, Managing Director, NextWealth	
<b>16:25 - 17:05</b>	<b>How will the future impact financial planning? From assets to operations and beyond</b>	
	Matthew Griffin, Futurist and Founding CEO, 311 Institute	
	In this interactive session, Matthew will explore:	
	<ul style="list-style-type: none"> <li>• Disrupting the future of finance and investing</li> <li>• Live longer, work less, and invest differently</li> <li>• The impact of the future on planning and investing</li> </ul>	
	Matthew is regularly featured in the global media including the BBC, CNBC, Bloomberg, Discovery, Viacom, and Wired, and is recognised as a futurist who helps investors lead an inclusive, sustainable future.	
<b>17:05 - 17:15</b>	Closing remarks	
	Sally Plant, Assistant Director, Financial Planning and Education Development, Chartered Institute for Securities & Investment	

## **Tuesday 3 October 2023: Awards Reception and Dinner**

<b>18:00 - 18:30</b>	<b>Minibuses from Wotton House to Denbies Wine Estate</b>
<b>18:30 - 19:30</b>	<b>Guided wine tasting of locally-produced wine</b>
<b>19:30 - 22:30</b>	<p><b>The Financial Planning Awards 2023 Ceremony, remembering and honouring the godfather of financial planning, Paul Etheridge, followed by dinner</b></p> <p>Dress code: Lounge suit</p>
<b>22:30 - 23:00</b>	<b>Minibuses from Denbies Wine Estate to Wotton House</b>
<b>23:00</b>	<b>Networking continues at Wotton House</b>

## Wednesday 4 October: Conference

8:00 - 9:00

### Yoga class / Guided walk of Wotton House estate

Optional activities. Please sign up at the enquiries desk if you wish to participate.

9:00 - 9:30

### Coffee and networking

9:30 - 9:35

### Opening address

Martin Ruskin CFP™ Chartered FCSI (Financial Planning), Client Director, Paradigm Norton Financial Planning

9:35 - 10:20

### Technology under the spotlight: Future of tech

Panellists: Oliver J. Bourke, Managing Director, Mercury Wealth Management; Josh Batten CFP™ Chartered FCSI (Financial Planning), Director, boost; Jon Doyle, Founder and Financial Planner, Juniper Wealth Management

In this dynamic session, facilitated by Ian McKenna, Founder & Director, Financial Technology Research Centre (FTRC), the panel will discuss:

- Using tech to build a revenue model that works for clients with lower assets (high earner not rich yet clients)
- What you need your digital presence to be
- The most useful pieces of technology they have implemented in their businesses
- If they could magic up one new piece of functionality, what it would be

10:20 - 10:50

### Coffee and networking

	Pure financial planning (Wotton Suite)	Practice management & Paraplanning (The Snug)	Behavioural finance & Technical (The Old Library)
10:50 - 11:30	<b>Prospecting &amp; intro calls: Target client referrals</b> Keith Batten CFP™ Chartered FCSI, Managing Director, boost Phil Bray, Founder and Director, The Yardstick	<b>The science of human relationships and how to be an inclusive leader</b> Kameka McLean, Group Head of HR, Walker Crips; and Founder, Let's Talk Diversity and Inclusion	<b>The psychology of money</b> Warren Shute CFP™ Chartered FCSI, Chartered Wealth Manager, Lexington Wealth Management
11:30 - 12:10	<b>Discovery meetings: From this day forward</b> Brendan Frazier, Founder, Wired Planning Dr. Moira Somers, Psychologist, Family Wealth, Consultant and Executive Coach David Gow CFP™ Chartered FCSI, Director, Acumen Kusal Ariyawansa CFP™ Chartered FCSI, Appleton Gerrard Keith Batten CFP™ Chartered FCSI, Managing Director, boost	<b>Business protection</b> Gregor Sked, Protection Development and Technical Manager, Royal London	<b>Retirement income: Is there a perfect blend?</b> Martin Lines, Development and Events Director, JUST
12:10 - 13:20	<b>Lunch and networking</b>		

	Pure financial planning (Wotton Suite)	Practice management & Paraplanning (The Snug)	Behavioural finance & Technical (The Old Library)
13:20 - 14:20	<p><b>Building the financial plan in person or in advance: Differing scenarios</b></p> <p>Brendan Frazier, Founder, Wired Planning</p> <p>Josh Butten CFP™ Chartered FCSI, Director, boost</p>	<p><b>Progressing the paraplanning profession</b></p> <p>Nathan Fryer, Director, Plan Works; Farida Hassanali CFP™ APP Chartered FCSI (Financial Planning), Senior Financial Planner, Paradigm Norton Financial Planning; Rebecca Kowalski FPFS, Cert ESG, Director of Overstory Finance</p>	<p><b>13:20 - 13:45</b></p> <p><b>The art of mind mapping: How to create and implement engaging financial life maps</b></p> <p>David Jones, Head of UK and Ireland Advisor Group and Vice President, Dimensional Fund Advisors</p> <p><b>13:45 - 14:20</b></p> <p><b>Managing mental depletion during major life transitions</b></p> <p>Dr. Moira Somers, Psychologist, Family Wealth, Consultant and Executive Coach</p>
14:20 - 15:10	<p><b>Implementation and ongoing planning meetings: Purpose and delivery</b></p> <p>Keith Butten CFP™ Chartered FCSI, Managing Director, boost</p> <p>Jonathan Gibson CFP™ Chartered FCSI, Managing Director, Wells Gibson</p> <p>Sarah Elson CFP™ APP Chartered FCSI, Director, Berry &amp; Oak</p> <p>David Gow CFP™ Chartered FCSI, Director, Acumen</p> <p>David Lamb CFP™ Chartered MCSI, Managing Director, Lamb Financial</p>	<p><b>Placing people, planet and purpose at the core of your business</b></p> <p>Paul Hargreaves, CEO, Cotswold Fayre &amp; Flourish; B Corp Ambassador</p>	
15:10 - 15:30	<b>Refreshment break</b>		
15:30 - 16:15	<p><b>Strength through adversity</b></p> <p>Charlie Walker, Adventurer</p> <p>Charlie specialises in long-distance, human-powered expeditions and has travelled over 50,000 miles by bicycle, foot, horse, raft, ski and dugout canoe. Meet the extreme explorer as he shares his passion for travelling to uncharted places and delivers an inspiring and thought-provoking session on goal-setting, risk-taking, and problem-solving in adverse conditions.</p>		
16:15 - 16:30	<p><b>Closing remarks</b></p> <p>Martin Ruskin CFP™ Chartered FCSI (Financial Planning), Client Director, Paradigm Norton Financial Planning</p>		
16:30 - 17:00	<b>Coffee and networking</b>		

Programme details and timings are subject to change

## Tech Zone

As well as catching up with the official event sponsors, you can view live demonstrations and discuss the future of financial planning with specialist tech companies and start-ups, including:

360DotNet	Conquest	Portfolio Metrix	Truth
Beyond Encryption	Model office	Protection Guru	TrySIFA
Cascade	Origo Services	SISOMA	twenty7tec.com
	Plusgroup	Sprint	Voyant

More firms will be confirmed shortly.



## Gold sponsor



## Sponsors



# Speakers



Kusal Ariyawansa CFP™ Chartered FCSI (Financial Planning)  
Branch Principal, Appleton Gerrard



Oliver J. Bourke  
Managing Director, Mercury Wealth Management



Phil Bray  
Founder and Director, The Yardstick



Chris Budd  
Founder, Institute for Financial Wellbeing



Josh Butten CFP™ Chartered FCSI (Financial Planning)  
Director, boost



Keith Butten CFP™ Chartered FCSI  
Managing Director, boost



Jon Doyle  
Founder and Financial Planner, Juniper Wealth Management



Julia Dreblow  
Sustainable Investment Specialist, SRI Services Director



Sarah Elson CFP™ APP Chartered FCSI  
Director, Berry & Oak



Brendan Frazier  
Founder, Wired Planning



Nathan Fryer  
Director, Plan Works



Jonathan Gibson CFP™ Chartered FCSI  
Managing Director, Wells Gibson



David Gow CFP™ Chartered FCSI  
Director, Acumen



Matthew Griffin  
Futurist and Founding CEO, 311 Institute



Farida Hassanali CFP™ APP Chartered FCSI (Financial Planning)  
Senior Financial Planner, Paradigm Norton



Paul Hargreaves  
CEO & B Corp Ambassador, Cotswold Fayre & Flourish

# Speakers



Heather Hopkins

Managing Director,  
NextWealth



Michelle Hoskin

Managing Director, Standards  
International



Matthew P. Jarvis CFP®

Co-Founder, The Perfect RIA and  
President, Jarvis Financial



David Jones

Head of UK and Ireland Advisor  
Group & VP, Dimensional Fund  
Advisors



Rebecca Kowalski FPFs, Cert ESG  
Director of Overstory Finance



David Lamb CFP™ Chartered MCSI  
Managing Director, Lamb Financial



Martin Lines

Development and Events Director,  
JUST



Ian McKenna

Founder & Director, Financial  
Technology Research Centre (FTRC)



Kameka McLean

Group Head of HR, Walker Crips



Kevin Moore, Chartered FCSI

Director Global Business  
Development, CISI



Professor Steve Peters

Consultant Psychiatrist, Best-  
selling Author and CEO, Chimp  
Management



(Chair) Martin Ruskin CFP™  
Chartered FCSI (Financial Planning)

Client Director, Paradigm Norton  
Financial Planning



Warren Shute CFP™  
Chartered FCSI

Chartered Wealth  
Manager, Lexington  
Wealth Management



Gregor Sked

Protection Development  
and Technical Manager,  
Royal London



Dr. Moira Somers

Psychologist, Family  
Wealth Consultant and  
Executive Coach



Tracy Vegro OBE

Chief Executive,  
Chartered Institute for  
Securities & Investment



Charlie Walker

Adventurer & Extreme  
Explorer