RESEARCH IN FINANCE

Professional Paraplanner

Technical Insight Seminars

2017 Event Pack

Professional Paraplanner Technical Insight Seminars

- Professional Paraplanner launched its first Technical Insight Seminar on 9 June 2015 at the Grange St Paul's Hotel, London. In 2016 we ran events in London, Manchester and Bristol.

- The investment and savings environment made for a challenging backdrop to our seminars, which to gave paraplanners structured educational material from some of the best names in the industry.

- As well as hearing from our speakers offering technical insights and strategic views on the trends and issues in the market, the more intimate nature of the seminar format meant paraplanners could question and discuss matters with the speakers either during or after the presentations.

- For 2017 we are extending the event programme to meet the delegate demand.

Professional Paraplanner is extending its event programme in 2017 after feedback from paraplanners. Following extensive research and consultation with the paraplanning community, an agenda has been carefully crafted to offer the most relevant and appealing content for this highly influential part of the advice chain.

The format for each event will include an opening plenary session followed by a series of focussed seminars. Each seminar will be 40minutes plus a Q&A and qualify for structured CPD. The events will conclude with a panel debate or independent speaker then closing with a networking lunch.

The half-day and full day events will cover some of the following topics and themes:

• Retirement – new retirement options; pensions transfers; income generation in retirement planning.

• Tax planning – trusts in estate planning; IHT; trust taxation, taxation of investment bonds; LTA testing; residence nil rate band, death benefits.

• Investment – risk profiling; market views; the quest for income; ETFs; portfolio building; DFM v Multi-Manager; DFM due diligence; active allocation to help navigate volatile markets.

• Technology – cashflow planning; platform due diligence; fund research tools.

• Regulation - core elements of the financial advice process and highlighting new examples from the regulator of good and poor practice.

Delegate feedback 2016

"Thought it was very well organised and everyone seemed genuinely happy and excited to be there. More of the same please! Thank you for arranging and organising these events it is so refreshing to have seminars designed especially for paraplanners and I have told all the paraplanners I work with about it already and 2 girls interested in the October one."

Paraplanner – Delegate London

"Event was VERY well organised…we could see how much effort you had put in to host this event which I was certainly very grateful for."

"I really liked the concept of being split out into smaller groups, it made the sessions more personal and interactive."

"I really liked the format with smaller groups making discussion easier. The venue (and catering!) was excellent."

"I preferred the presentations in smaller groups so you could ask questions freely without feeling intimidated. I really enjoyed the event and sincerely hope there will be more to come!"

Paraplanners – Delegates Manchester

Target Firms – all indicated they would attend event organised by Professional Paraplanner

Advies Private Clients
Alan Boswell Group
Albert Goodman Chartered Financial Planners
Almary Green Investments
Arbuthnot Latham
Argentis Financial Management Limited
Ashcourt Rowan
Atlantic Swiss Wealth Management
Beacon Wealth Management Ltd
Bellpenny
Beaufort Asset Management
Berkeley Burke
Bestinvest Wealth Management
Blackstone Moregate
Brewin Dolphin
Carbon Financial Partners Ltd
Carpenter Rees Ltd
Clay Rogers & Partners Ltd
Charles Stanley
Chase De Vere
Clarion Wealth Planning Ltd
Close Brothers Asset Managment
Crystal Wealth Management LLP
Deep Blue Financial Limited
deVere United Kingdom
DHM Wynchwood LLP
Edinburgh Wealth Management
Fairstone Financial Management (City) Limited
Emery Little LLP
Fleet Street Financial Ltd
Grant Thornton UK LLP
Greystone Financial Services Ltd
HC Wealth Management
Informed Choice Ltd
Investec Wealth & Investment Ltd
Jelf Financial Planning
John Lamb
Kellands (Hale) Ltd
LEBC Group Limited
Libertas Wealth Management
LighthouseCarrwood

Lovewell Blake Financial Planning Ltd
Lowes Financial Management Ltd
Lucas Fettes & Partners
Manse Capital Limited
Mattioli Woods plc
Mazars Financial Planning Ltd
Messer & Matthews Limited
Monahans Financial Services Limited
Moore Stephens LLP
Myers Davison Ginger Ltd
Newell Palmer & Associates Ltd
Oaklands Wealth Management Ltd
Origen Financial Services Limited
Oval Financial Services
Pannells Financial Planning Ltd
Parkgate FS LLP
Partners Wealth Management LLP
Pearson Jones Plc
PKF Cooper Parry Wealth Ltd
Premier Wealth Planning
Rathbones
Roundhouse Financial Services
Salisbury House
Saltus Investment Managers
Sanlam Private Wealth
Sedulo Wealth Management Limited
Smith Jackson Wealth Consultancy Limited
St. James's Place
Stafford House Investments
TAG Wealth Management
Talbot and Muir Limited
The Citimark Partnership Limited
The Timbank (UK) Ltd
Thomas & Gentry IFA Ltd
Thomas Miller Investment
Towergate Financial
Towry Limited
Truestone Asset Management
Vintage Financial Limited
Warwick Butchart Associates Limited
Westerby Investment Management
Woodhead Wealth Management

Professional Paraplanner

RESEARCH IN FINANCE

Event Overview

- 25 - 40 carefully selected paraplanners at each venue
- Max 6 sponsors
- ½ day or full day conference
- Networking

Sponsorship Opportunities

Partner Sponsor

- Boardroom Speaking Slot – sponsor to facilitate a 40 minute interactive session with a selection of delegates plus Q&A (on rotation)
- 2 sales passes and speaker pass
- Promotion and branding on all associated event materials and signage
- Full delegate list following the seminars
- Feedback report from delegates
- Event coverage in magazine

Professional Paraplanner Technical Insight Seminars

Professional Paraplanner

RESEARCH IN FINANCE

Previous Sponsors

COLUMBIA THREADNEEDLE INVESTMENTS

PRUDENTIAL

Standard Life Investments

Allianz Global Investors

Fidelity WORLDWIDE INVESTMENT

iShares by BLACKROCK

Invesco Perpetual

Investec Structured Products

FundsNetwork

Locations and Dates 2017

- Birmingham – May 2017
- London – June 2017
- Edinburgh – September 2017
- Manchester – October 2017
- Bristol – November 2017

Professional Paraplanner Technical Insight Seminars

CONTACT DETAILS

Research in Finance
80 Coleman Street
London EC2R 5BJ

Richard Ley
Founding Director
Tel: 020 7104 2239
Email: richardley@researchinfinance.co.uk

Toby Finden-Crofts
Founding Director
Tel: 020 7104 2236
Email: Tobyfindencrofts@researchinfinance.co.uk