

THE PLATFORM

“It’s not just about price”

The Platform has teamed up with the FCA and speakers from across the platform and investment spectrum to host a morning which will:

- Give IFAs a sense-check – what is common practice and what are others else doing?
- Assess this against a broader market backdrop and highlight new developments and any problem areas
- Share IFA case studies – pick out some examples which showcase best practice
- Give you a chance to hear the latest thinking and ideas from the worlds of platforms and investments

Each speaker has been given 15 minutes, a 5 slide maximum rule and has been asked to share information genuinely representative of adviser practice today.

Sessions:

09:00-09:15 What do we think about platforms today? The Platform

09:15-09:30 **DEMONSTRATING VALUE TO CUSTOMERS**

- i. What does “value add” actually mean?
- ii. 2016 legacy commission – “to do’s”
- iii. A case study

This session will be led by AXA

09:30-09:45 **PRICE**

- i. 11 months into RDR – changes we have seen in the direct & adviser customer base
- ii. Changes we anticipate to pricing models moving forward
- iii. 2 x customer portfolio case studies – how fixed £ fees can really make a difference

This session will be led by Alliance Trust

09:45-10:00 **PLATFORM DUE DILIGENCE**

- i. Challenges today
- ii. What does good look like?
- iii. Word on the street is

This session will be led by The Platform

10:00-10:15 **PICKING THE RIGHT PLATFORM**

- i. What platforms do well
- ii. Benefits of a common platform – case study
- iii. Multimanager – right for who?

This session will be led by Aviva

10:15 – 10:40 Platforms - Questions, challenges, panel discussion

10:40 – 11:10 **COFFEE**

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11:10 – 11:25 PASSIVE INVESTMENTS AND ETFs

- i. Blended portfolios – 4 types of approach from agnostic to active
 - ii. Case studies – what are IFAs doing today
 - iii. Best practice and suggestions to consider
- This session will be led by iShares

11:25-11:40 MULTI-MANAGER

- i. Adviser trends- how are advisers managing the investment piece
 - ii. A blended approach
 - iii. Segmentation – case studies and best practice
- This session will be led by Architas

11:40-12:10 Investments - Questions, challenges, panel discussion

12:10-12:30 HEARING FROM THE REGULATOR

An update on what best practice looks like when considering CIPS and platform usage. What does professionalism actually mean?

12:30-12:50 Questions for the FCA; final questions and discussion

LUNCH

Speakers:

Our speakers include:

- Dave Robson, Head of Aviva Distribution, Aviva
- Dan Aylett, Business Development, Architas
- Pollyanna Harper, Director, iShares
- Holly Mackay, Managing Director, The Platform
- Patrick Mill, Managing Director, Alliance Trust Savings
- Emma Napier, Head of Adviser Relations, The Platform
- Rory Percival, Technical Specialist, FCA
- Shaun Sandiford, Business Development Director, AXA Wealth

Venues:

• London	16 th April – Grocers Hall
• Birmingham	26 th April – Studio Venues
• Bristol	30 th April – Armada House
• Edinburgh	20 th November – Radison Blu Hotel
• Manchester	27 th November – Copthorne Hotel



Accredited for continuous professional development

3 hours and 20 minutes

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