

2019 Agenda

08:30	Registration and networking coffee	
09:10	Chair's opening remarks Jeremy Fawcett, Head of Platforum	
09:25	Investment Distribution Dynamics in the UK and Europe How successful asset managers are recognising that regulatory and other changes are increasing divergence between national markets and the ways they are reacting to this point of inflection. Andrew Ashwood, Senior Analyst, Platforum	
09:40	Keynote Panel Discussion Asset management at a crossroads – the challenges and opportunities Asset managers' margins are under pressure from all directions: regulators, low-cost competitors, distributors, the Brexit process. Buoyed up by one of the longest ever bull markets, asset managers have been cushioned against shocks, but now markets have become bumpier and the wider environment is growing less forgiving. More than ever asset managers need to look out for the dangers and seek the changing opportunities. <i>Chaired by:</i> Danby Bloch, Head of Editorial Strategy, Platforum <i>Panellists:</i> James Rainbow, Chief Executive, Schroders Personal Wealth Dame Helena Morrissey, Head of Personal Investing, Legal & General Investment Management Richard Wilson, Chief Executive Officer, Interactive Investor	
10:15	Headline sponsor presentation	
10:30	Morning networking break	
	TRACK A: UK Fund Distribution	TRACK B; European Fund Distribution
11:05	Investing for retirement Advisers have reacted to the challenges of investing for decumulation with a range of strategies and solutions. Asset managers need to understand how different adviser sectors are behaving and who will be the winners and losers. Andrew Ashwood, Senior Analyst, Platforum	The evolving pan-European market How should asset managers and others in the value chain develop appropriate strategies for penetrating pan-European markets successfully? Is ESG finally becoming a mainstream issue for asset managers? Richard Bradley, Research Director, Platforum

11:20	<p>Panel Discussion</p> <p>The retirement panel</p> <p>What do consumers want and need? The multiplicity of solutions could mean that advisers and others in value chain have sorted it – or are simply confused. Will asset managers, DFMs, platforms and advisers provide the right solutions?</p> <p><i>Chaired by:</i> Malcolm Kerr, Independent Consultant</p> <p><i>Panellists:</i></p> <p>Sir Steve Webb, Director of Policy and External Communications, Royal London</p> <p>Gerald Rehn, Head of International Product & Governance, BNY Mellon</p> <p>William Allport, Senior Retirement Strategist, Vanguard</p> <p>Adrian Boulding, Chief Innovation Officer, Spire Platform Solutions</p>	<p>Panel Discussion</p> <p>Platforms at the data epicentre</p> <p>Requirements around EMTs, KYC, ESG and share class proliferation are turning platforms into data businesses. How are platforms adapting to this, what more could they do and what challenges are yet to be overcome?</p> <p><i>Chaired by:</i> Richard Bradley, Research Director, Platform</p> <p><i>Panellists:</i></p> <p>Matt Newnham, Managing Director, MFEX</p>
11:55	<p>Panel Discussion</p> <p>How solutions are structured and what selectors are looking for?</p> <p><i>Chaired by:</i> Danby Bloch, Head of Editorial Strategy, Platform</p> <p><i>Panellists:</i></p> <p>Mike Roberts, UK MD & Head of Innovation, PortfolioMetrix</p> <p>Roddi Vaughan-Thomas, Head of Communications and Marketing, Tatton Investment Management</p>	<p>Panel Discussion</p> <p>The Brexit conundrum panel</p> <p>The impact of Brexit on fund distribution into and out of the UK. How asset managers are finding solutions to the changes brought by the UK exiting the EU.</p> <p><i>Panellists:</i></p> <p>Sven Kasper, SVP & International Head of Regulatory, Industry and Government Affairs, State Street</p>
12:30 Networking lunch break		
TRACK A: Advised Distribution		Track B: D2C & Digital Investing
13:45	<p>Fund distribution in the UK adviser market</p> <p>How should asset managers segment the adviser market? How are adviser propositions evolving? Which segments are the goldmines and which are the expensive swamps? Are platforms the key to penetrating the adviser market?</p> <p>Andrew Ashwood and Danby Bloch, Platform</p>	<p>Platform Roundup</p> <p>Jeremy Fawcett, Head of Platform</p>

<p>14:00</p>	<p>Panel Discussion</p> <p>Intermediated distribution</p> <p>Adviser markets in UK are dominated by small firms – but this is changing as larger operators consolidate their smaller rivals and the banks gear up to enter the market. But the SME sector remains highly resilient.</p> <p>Banks continue to dominate much of the continental market, but as UK seems to be getting more restricted, much of the rest of Europe may be growing more independent. Divergences in the implementation of MiFID II have increased differences between markets. Which asset managers will benefit and which will suffer?</p> <p><i>Chaired by:</i> Richard Bradley, Research Director, PlatforuM</p>	<p>Panel Discussion</p> <p>Where is the Growth?</p> <p>High customer acquisition costs combined with low ongoing margins have led many robo propositions to struggle. Yet some sectors have shown promise for D2C businesses, including workplace pensions, retail banks, direct investor enthusiasts. Which routes to market are most likely to succeed?</p>
<p>14:35</p>	<p>Panel Discussion</p> <p>The evolution of platform markets</p> <p>Some platforms will exploit their sheer scale; others will aim to differentiate themselves through their offerings and other strategies. Asset managers regard platforms as a key route market, while regulators and others see their potential leverage for lowering fund costs.</p> <p><i>Chaired by:</i> Richard Bradley, Research Director, PlatforuM</p> <p><i>Panellists:</i></p> <p>Jaime Pérez-Maura, Global Head of Business Development & Sales Planning, Allfunds</p>	<p>Digital demos: CX robo, mobile, AI...</p> <p>See the latest developments from different markets around the world and assess their likely impact on your marketplace.</p> <p>Best in class in customer experience</p> <ul style="list-style-type: none"> • Definitions – what is CX? • Why is it important and where is ROI • A simple framework for managing it • Examples from within the financial sector and outside <p>Neil Sharp, Partner, PEN Partnership</p>
<p>15:10</p>	<p>Afternoon networking break</p>	
<p>15:40</p>	<p>Our relationship with money – connecting with a younger and more diversified audience</p> <p>Mark Adams, VP & Head of Innovation, Vice</p>	

16:00 Reinventing Robo?
• Do we really want to reach a new audience?
• Escaping from a legacy mindset
• Differentiation starts with targeting
• How are we going to make any money?

Lucian Camp, Principal, Lucian Camp Consulting

16:15 Panel Discussion
How will people invest in 10 years' time.

Chaired by: Lucian Camp, Principal, Lucian Camp Consulting
Panellists:
Romi Savova, Chief Executive Officer, PensionBee
Richard Theo, Chief Executive Officer, Wealthify
Mark Adams, VP & Head of Innovation, Vice

16:50 Chair's closing remarks and close of conference
Jeremy Fawcett, Head of PlatforuM

17:00 Drinks reception

CONTACT US

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