DYNAMIC PLANNER

2026 Conference agenda

09:00 – 09:30	**Welcome, registration, breakfast** Say hello, grab a drink and get comfortable for the exciting day ahead.
09:35 – 09:45	**Welcome to the Dynamic Planner Conference** With Katie Prescott, Technology Business Editor at *The Times.*
09:45 – 10:45	**Unlocking trusted advice** Keynote by Dynamic Planner founder and CEO, Ben Goss. Our vision for the industry, brought to life through real client stories and what's coming next in platform-led advice.
10:50 – 11:05	**Break and networking** Meet with fellow delegates and Asset Management Partners over refreshments and nibbles.
11:10 – 12:10	**Panel breakout sessions (run in parallel)** Choose one of two sessions. ▶ **Retirement under pressure** ▶ **Engaging the next generation** These sessions run at the same time. Delegates attend one in the morning and switch after lunch to join the other session in the afternoon.
12:15 – 13:15	**Lunch, network and discover**
13:20 – 13:50	**What technology disruption means for advice firms** Katie Prescott brings an outside-in view of the forces reshaping the market, AI, platforms and rising expectations and what it means for business leaders in a regulated world.
13:55 – 14:55	**Panel breakout sessions (run in parallel)** Delegates switch rooms to attend the other breakout session.
15:00 – 15:15	**Break and network** With Asset Management Partners over refreshments and nibbles.
15:20 – 16:05	**Chief Investment Officer panel discussion** Chaired by Katie Prescott. Hear the thoughts of leading CIOs from a selection of the UK's most influential financial planning and advice organisations of today.
16:10 – 16:40	**The data revolution** Edwina Dunn, co-founder of dunnhumby and pioneer of Tesco Clubcard, explains how one of the most influential data transformations in retail history reshaped customer trust, and what financial advice can learn.
16:45 – 16:55	**Closing remarks** With Ben Goss, Dynamic Planner CEO.
17:00 – 17:50	**Drinks reception** Stay a little longer, enjoy a drink with peers and colleagues before heading home.