

2024 Conference agenda

08:00 - 09:00	Chief Technology / Operating Officer Round Table – With Dynamic Planner CTO Piers Lawson. Unpacking today's integrated tech stack. <i>By invitation only.</i>
08:30 - 09:00	Registration, breakfast and networking. Make valuable new connections with fellow advice professionals and Dynamic Planner users, framed by unique views from Floor 3 of 22 Bishopsgate, looking out over the City of London.
09:05 - 09:15	'Welcome' , with Dynamic Planner Chief Revenue Officer Yasmina Siadatan. A warm welcome to a day dedicated to financial planning, technology and your firm. What to look forward to. And how you can gain the most value from Conference.
09:15 - 09:35	Keynote – With 2024 Conference host, broadcaster and journalist Amol Rajan. The former editor of The Independent is set to unpack the radical evolution of today's media landscape.
09:35 - 10:30	Conference keynote , with Dynamic Planner CEO Ben Goss. How can leading financial planning technology help you today, in new, innovative ways, providing better outcomes for your business and your clients? Hear Ben's vision for the next 12 months and pivotally beyond.
10:35 - 10:50	Refreshments and networking. Make valuable new connections with fellow advice professionals and Dynamic Planner users, framed by skyrise views from 22 Bishopsgate, gazing out over the City of London.
10:55 - 11:55	'Breakout Session' , with Conference Partners. Exclusive insights and leading analysis from three top asset management firms. Take the opportunity for some opening research into latest investment solutions and innovations for your different client target markets.
10:55 - 11:55	Chief Compliance / Risk Officer Round Table – With Dynamic Planner Chief Proposition Officer Chris Jones. What are today's regulatory challenges and opportunities? <i>By invitation only.</i>
12:00 - 12:45	Chief Investment Officer Panel. A Dynamic Planner Conference highlight. Hear candidly from leading asset managers in the City. Do they harbour any 2023 regrets? What are their hopes and outlooks for 2024?
12:50 - 13:50	Lunch and networking. An hour for you to review and recharge over food. Connect with fellow advice professionals and Dynamic Planner users, framed by unique views from Floor 3 of 22 Bishopsgate, looking out over the City of London.
13:55 - 14:25	Keynote – With Dynamic Planner Chief Proposition Officer Chris Jones / Head of Product Joshua Knight. How is Dynamic Planner evolving, and driving more value in 2024 for your firm and clients?
14:30 - 15:30	'Breakout Session' , with Conference Partners. Exclusive insights and leading analysis from three top asset management firms. Take the opportunity for some opening research into latest investment solutions and innovations for your different client target markets.
15:35 - 15:50	Refreshments and networking. Make valuable new connections with fellow advice professionals and Dynamic Planner users, framed by unique views from Floor 3 of 22 Bishopsgate, looking out over the City of London.
15:55 - 16:25	Conference keynote , with prominent figure [to be announced] in financial services, set to address today's need to open up financial advice and guidance for UK consumers.
16:25 - 16:35	Closing remarks , with Dynamic Planner CEO Ben Goss. What have been the day's top takeaways, for you, the team at your firm and your clients? A convenient look-back and wrap-up.
16:35 - 17:35	Drinks reception and networking. A final hour for you to relax and sociably debate the day's takeaways with fellow Conference delegates. What's been your opinion? Plus, take the chance to chat one-on-one with members of the Dynamic Planner team.

