15 / 20 June 2023 Roadshows – Agenda

09:30	Arrival & networking
10:00	Intro & welcome from Dynamic Planner – 'Reimagine the way you provide advice'
10:15	Panel debate – 'The Consumer Duty: The good, the bad and the ugly'. Selected experts from financial services deep dive – with no comments off the table – into what the Consumer Duty means for you and your firm
11:15	Why is the Consumer Duty such a challenge for financial services? – Dynamic Planner Proposition Director Chris Jones asks, 'What are the regulation's real pain points?'
12:00	Lunch & networking
13:00	Fireside chats – With Dynamic Planner partners and leading asset managers M&G Investments, Global X, TIME Investments, EQ Investors, & Sarasin & Partners. Investment solutions designed for your different target markets of clients
14:00	Panel debate – 'The future of Dynamic Planner'. Whether you have used the system for years, or are considering adopting it for the first time, how can award-winning technology enable you to raise the level of everything you do for your clients?
15:00	Break & networking
15:15	The Consumer Duty – Your chance to reimagine the way you provide advice. How are you completing products and services governance? How are you delivering value in the financial planning process? How and when are you communicating with your clients? How are you offering them the right support?
16:00	Close