CISI

CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT

AFPF CONFERENCE 2025

08:45 – 09:30	Registration and refreshments
09:30 – 09:35	Welcome address – Accredited Financial Planning Firm Steering committee chair

Ian Pickford CFP Chartered FCSI (Financial Planning)

Forvis Mazars

09:35 – 10:00	Winner of AFPF™ of the year 2024:

The winners of the Accredited Financial Planning Firms, Acumen Financial Planning will discuss their successes and achievements in the last year, demonstrating how they have grown and over come challenges.

10:00 – 10.45	Part 1) Annual Planning Process: Innovations that have changed the APP, by improving efficiency whilst enhancing the client experience

In this session we will hear from a variety of firms, platforms and back-office providers to understand and learn about recent innovations they have made to improve their APP, in order to increase efficiency and improve the client experience.

(10 Min Flash Talks)

- Expert Wealth Management
- Transact
- P1

Q&A

10.45 – 11:15	Refreshment Break
11.15-12.00	Part 2) Annual Planning Process: Innovations that have changed the APP, by improving efficiency whilst enhancing the client experience

In this session we will hear from a variety of firms, platforms and back-office providers to understand and learn about recent innovations they have made to improve their APP, in order to increase efficiency and improve the client experience.

- intelliflo
- IRESS
- TBC
- Chesterton House

Q&A

12:00 – 13:00	Lunch & Networking

13:00 – 14.00 Sharing challenges and solutions within your firm

In this session the audience will be split into groups to explore and critically assess a wide range of challenges (listed below) faced within their firms, while also identifying and discussing effective solutions and strategies for overcoming them. Participants will engage in thought-provoking discussions to share insights, consider best practices to address common issues.

- Quick wins - what have you done to improve efficiency within your firm?
- AI – are you using it within your firm?
- Biggest issue you have faced in the last 12 months
- Tech & AI: process for due diligence
- Succession planning – what is right for your firm?
- Consumer duty – changes you have made within your firm

Q&A

*Tables will all have a lead

14.00 – 14.45 Future-proofing financial advisers for the great wealth transfers

Marie-Laure Humbert - Goldman Sachs

This session will delve into the imminent and massive transfer of wealth between generations, which poses both opportunities and challenges for financial advisers.

Advisers play a crucial role in ensuring smooth wealth transfers, but special attention is required in order to handle the sensitive topics related to legacy planning and family dynamics across age and gender.

We will discuss connecting with clients from many different viewpoints, engaging with the next generation in order to meet the needs of both current and future clients, as well as:

- How to building advisory teams that reflect diversity in age and gender to better connect with clients across generations
- Developing specialised services for different client stages
- The innovative products and services that will address the complexities of intergenerational wealth transfer

14.45 – 15:15 Refreshment Break

15:15 – 16.30 Workshop session: Tailored practical training to help managers to thrive in their role.

McNaughton McGreggor

Getting the best from today. Being better tomorrow.

This session comprises a series of interlinked, highly impactful and memorable interactive exercises, specifically designed to challenge the audience's perceptions and question their own and each other's position on change and what they may previously have deemed impossible.

16.30 Closing words