

## Agenda Networking Seminar for Women – 8<sup>th</sup> December 2011

### Agenda:

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“Time and time again we attend meetings, conferences and seminars where there are only a handful of women in the room. This is more true the more senior the attendees. The issue can become self-perpetuating, as it becomes difficult for women to build a network of peers at different companies.”

Following two successful events in 2009 and 2010, The Platform are planning to hold a seminar for women working in the platform and investments industry to provide them with the opportunity to hear from senior female directors, to learn about the platform and investments industry and most importantly, to make contacts and connections.

We welcome women at all stages of their careers. Those not holding senior positions who are unlikely to get approval for the delegate rate should contact us directly as we make a limited number of free places available to support those at the earlier stages of their careers. These are not for senior directors from big companies!

This time, in the run-up to Christmas, we close with champagne and some gifts and shopping!! Why not?

**Venue: Schroder's**

**Date: 8<sup>th</sup> December 2011**

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### 1330 –Registration

#### **1400 - 1420 – Introduction and market update . Setting the scene.**

*Chair, Holly Mackay, MD, The Platform*

#### **1420 - 1440 SESSION ONE – An industry view - Changing Financial Services as we know it.**

Michelle talks to delegates about her views of the changing distribution landscape; her involvement in the FSA panel consulting on RDR and finally some feedback from a platform project for the Consumer Panel. How is our market changing across both the advised and non-advised spectrum?

*Michelle Cracknell, Associate Director, Bluerock Consulting*

#### **1440 - 1500 SESSION TWO– An adviser view – how is our world changing?**

We hear from an IFA on what the world looks like from the adviser perspective - regulation, client expectations and raising qualification levels to achieve further success. How do platforms fit into the new adviser world? What do IFAs really want?!

*Ruth Sturkey – IFA and Director of The Red House Consulting*

#### **1500 - 1530 TEA AND NETWORKING**

#### **1530 - 1550 SESSION THREE – An investment management view – the world of a discretionary fund manager.**

Gina Miller gives us her insights into the role of discretionary portfolio management. Is this the best way to manage client assets and how do DFMs work with platforms? Friend or foe?? Coexistence or competition? *Gina Miller, Director, SCM Private*

# THE PLATFORM

## **1550 - 1610 SESSION FOUR – A platform view - challenges in the next 12 months.**

An opinion from a platform on platforms' status post RDR; who's doing what well; market positioning as a newer player in the adviser space; articulating a unique position in a target market.

*Patti Boyle, Global Wealth Services, SEI*

**1610 – 1645 SESSION FIVE – “If I were in charge what would I do differently....”** - a panel discussion which opens up to discussion, reaction and comment from the floor. The highlight of previous events, the last session of the day allows general discussion and debate, with the below panellists to offer a view of almost any angle one might want!

*Michelle Cracknell (as above – general industry)*

*Julie Greenwood (Director, L&G – a life company)*

*Tina Harris (Head of Employee Platforms, the Platform – the corporate)*

*Holly Mackay (as above – direct to consumer)*

*Gina Miller (as above - an investment manager)*

*Patti Boyle (as above – a platform)*

*Ruth Sturkey (as above – the IFA)*

## **1645 – 1700 A round-up of the afternoon /conclusions**

*Holly Mackay, MD, The Platform*

## **1700 – 1830 DRINKS AND SHOPPING!!**

### **Event specifics**

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- The audience will be approximately 80-90 people including speakers
  - An important part of the day is input from the floor and the discussion and views shared
  - We allow good time for tea/ drinks as catching up with peers and meeting new people is an important part of the day
  - Delegate cost £200 + VAT.
  - Schroders have very kindly agreed to make their central London offices available to host this seminar – we are very grateful for their support
  - 1830 close after networking drinks
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