

Standing out in a crowd

How to differentiate your advice service with an outstanding brand



Every time you are in front of your clients (whether face to face or through technology) you need to think, does this represent your business as well as you'd like?

To understand the importance and power of branding, and embrace technology to help reinforce your own brand and values, join us for AdviserTech LIVE #6. We've invited a range of speakers from across the technology industry to help you develop and deploy your brand with your clients.

INTRODUCTION ▶ 14.30 – 14:40



Event facilitator, Lee Robertson, CEO and Founder

With over 20 years of experience in the financial services sector, Lee Robertson is an award-winning financial planner and investment specialist. As founder and CEO of Octo Members Group, a private members group for financial service professionals in a dynamic native app, Octo Members aim to facilitate, speak and engage with the financial sector.

SPEED SESSIONS ▶ 14:40 – 15:40

Abbie Knight

Abbie Knight
Consultant, Commentator and Keynote Speaker

Marketing in the age of disruption.

In today's age of disruption, how will you stand out from the crowd? In this session, Abbie will share the two fastest paths to differentiation. She'll show you how to differentiate your business and personal brand, using real-life examples. And how to get there faster with automation.



Sim Sangha
Business Development Director

Portal personalisation is paramount.

Learn how to create your own unique digital communication experience and differentiate your business from your peers, competitors and suppliers. We'll show you how to deliver a personalised, yet efficient client communication experience setting you apart from the crowd.



Anna Plotnek
Managing Director

Practical tips for building your brand online.

Your website and online presence has never been more important. We'll be looking at simple, effective ways to stand out and make sure your brand is relevant and engaging.



Dan Marsh
Head of Customer

Taking control of the platform experience.

Learn why more and more advice firms of all sizes are choosing to operate a platform of their own – and how it differs from simply using or white labeling an existing platform solution.



Chris Edmeades
Managing Director

How own branded funds can support your investment proposition.

For a variety of reasons, firms may wish to consider creating their own funds to augment their investment proposition. Minerva Fund Management Solutions work in partnership with Wealth Managers to consider the merits of and implement, a branded fund range.



Rebecca McMurry
Manager, Enterprise Accounts

Brand & Deliver

How to drive growth with scroll-stopping marketing looking to get better results from your marketing? Join AdvisorStream for an educational session on how to use content marketing best practices to stand out, demonstrate value, and spark action from prospects/clients.

Q&A SESSION & CLOSE ▶ 15:40 – 16:00



Lee Robertson, CEO and Founder