

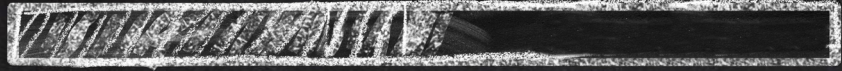
AdviserTech LIVE!

Digital can transform the way you do business, you've probably already taken many of the difficult steps with video conferencing, document sharing, and e-signatures. However, there are many more efficiencies to be gained through selecting market leading technology partners.

Sign up for one of our upcoming events to learn how to select and implement the right technologies designed to meet the challenges of the 21st century adviser.

Tue 1st June 10:00 – 11:30
Thu 3rd June 10:00 – 11:30
Wed 9th June 14:30 – 16:00

NEW MINDSET LOADING...



INTRODUCTION

10:00 – 10:10 | **Jigsaw Tree** | Chris Baigent-Reed



SPEED SESSIONS

10:10 – 10:20 | **moneyinfo** | Sim Sangha

How to engage the most important person in your business, your client!

Technology to increase client engagement whilst improving your process efficiency, data security, and adviser technology adoption.

10:20 – 10:30 | **threesixty Services** | Russell Facer

Understanding your needs, so that you can help others with theirs.

Personal goals, business planning, and client services? Understanding both you and your client's needs help you build foundations to support a long-term relationship.

10:30 – 10:40 | **Clever Adviser** | George Cliff

How technology can drive better investment outcomes. An insight into how a fully quantitative and systematic fund selection process, that removes human emotion from the investment decision, can drive considerably better outcomes for clients.

10:40 – 10:50 | **AdvisorStream** | Rebecca McMurry

The adviser's guide to supercharging your marketing. Join moneyinfo and AdvisorStream for an interactive session on how financial advisers can use digital marketing automation to get more clients without the extra workload.

10:50 – 11:00 | **PLOTT Creative** | Anna Plotnek

(Digital) Branding – the mask or the ventilator? Covid has certainly been a catalyst for change. Today we look at the importance of branding within the financial sector and ask, is branding simply the mask of an organisation, or the ventilator, helping it to survive?

11:00 – 11:10 | **intelliflo Planning** | Rob Tedder

Unleash the power of cashflow modelling. Bring your advice to life with minimal effort but maximum impact. A picture speaks a thousand words. We will demonstrate how using effective cashflow modelling you can visualise how your advice can enable clients to see things clearly, enabling them to move forward confidently.

Q&A SESSION & CLOSE

11:10 – 11:30 | **Jigsaw Tree** | Chris Baigent-Reed

