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PARAPLANNER CONFERENCE 2025

Agenda

5 June 2025

IET Birmingham

The Paraplanner Conference 5 June 2025

The future of effective paraplanning, engineered for success

08:30 – 09:30 **Registration and refreshments**

09:30 – 09:40 **Welcome address**

Dan Atkinson CFP™ APP Chartered FCSI (Financial Planning) Head of Technical Paradigm Norton
& Steven McBurnie CFP™ APP Chartered FCSI (Financial Planning) - Paraplanner, Wright, Johnston & Mackenzie

09:40 – 10:00 **Winner of the Paraplanner of the year 2024:**

Brad Sheridan – Paraplanner, BRI Wealth Management Plc

10:00 – 10:45 **From Numbers to Narrative: The Art of Using Data to Answer Client Questions**

Ilinca Man: Senior Associate, Dimensional
Josh Hunt: Senior Associate, Dimensional

Paraplanners work with financial data every day, but clients get real value when data is communicated in a way that is relevant and meaningful. This session will explore the practical ways that planners can use data and visuals to help answer client questions. We will provide examples of how to present information and outline how storytelling principles can add meaning to the numbers.

10:45 – 11:30

STREAM 1

Next generation using AI for Paraplanners

Chair: Steve Nelson- Insight Director, the lang cat

Panel: Jeremy Bensoussan: Co-founder and CEO, Avenir
Scott Daniels – Co-Founder - Plus Group

This panel will discuss the next generation of AI for paraplanners, what do Paraplanners do and don't understand?

Looking at how AI can enhance the efficiency and accuracy, while considering data protection, ethics and value that can be provided within the financial services industry.

STREAM 2

Effortless clarity: Enhancing Paraplanning with Cashflow Modelling

Adam Leci - Technical Consultant – Prestwood Software

Discover how cashflow modelling can revolutionize your role as a paraplanner, turning complex financial concepts into clear, visual narratives for your clients.

This session will demonstrate how cashflow modelling simplifies your workload, enhances client understanding, and ultimately makes your job easier and more efficient. Join us to learn practical tips and tools that will help you leverage cashflow modelling to its fullest potential, ensuring it becomes an invaluable asset rather than an added responsibility.

11:30 – 12:00 **Break & networking**

12:00– 12:45 **Navigating Due Diligence with Confidence and Care (Ethics CPD)**

Michael Lawrence Consulting Lead, Bovill Newgate & Paraplanner Committee
Alison Neale, Director, Principle Paraplanning
Steven McBurnie CFP™ APP Chartered FCSI (Financial Planning) - Paraplanner, Wright, Johnston & Mackenzie
Dan Atkinson CFP™ APP Chartered FCSI (Financial Planning) Head of Technical Paradigm Norton

Explore the human side of financial planning—how and why mistakes happen, and the vital role you play in catching them early. Learn practical strategies for error checking, supporting team wellbeing, and navigating tricky situations with professionalism and empathy. From managing missteps to building a culture of accountability, this session equips you with the tools to turn ethical challenges into learning opportunities.

12:45 – 13:45 **Lunch and networking**

	STREAM 1 (PM Workshop session) Early to mid career	STREAM 2 (PM Workshop session) Mid career to Advanced
13.45 – 14:30	**Order of Taxation – Income tax reduction tactics** *Andy Zanelli: Head of Technical Engagement - Aberdeen* In today's world of financial planning we have so much flexibility to deliver a great client outcome. How do we make the most of the order of taxation, the basic tax planning wrappers, and all the available tax allowances to produce tax efficient income options?	**Proactive and pragmatic Pension & IHT Planning Beyond 2027** *John Reynolds CFP™ Chartered FCSI (Financial Planning): Independent Pension Analyst at Expert Pensions Consulting* *Peter Lawlor: Director - Expert Pensions Consulting* Uncertainty surrounds post-2027 pension and IHT rules. This practical case study session shows the proactive strategies/options you can suggest now, to help prepare your adviser and client for the challenges ahead. We will explore integrated planning, scenario modelling, and technical analysis, focusing on death benefits and IHT efficiency to build robust, competent, and compliant planning based on securing legacies amidst potential legislative change...
14:30 – 15:00	**Afternoon break**	
15:00 – 15:45	**Career development -becoming the best paraplanner you can be, it's not just exams** *Chair: Sam Patterson APFS Chartered Financial Planner, Head of Delivery Equilibrium* *Rebecca Tuck CFP™ APP Chartered FCSI (Financial Planning), Financial Life Planning* *Hayley Rabbets, Head of The Verve Foundation* *Frazer Cronin, Head of Operations and Technical at First Wealth* Join us for a dynamic panel discussion exploring the many faces of paraplanning—how different approaches can shape your role, your relationships, and your career. Our panelists will share real-world insights on building strong professional connections, navigating conflict with confidence, and the leadership and communication skills that have helped them grow. Whether you're just starting out or looking to take the next step, this session will offer practical tips and honest reflections to help you elevate your paraplanning journey.	
15:45 – 16.45	**Keynote: ON/OFF – Killing stress before it kills you** *Silvia Garcia: Leadership Advisor| TED x Speaker, Author, Consultant | Former Coca-Cola Marketing and Happiness Institute Global Director.* Uncover the mechanism of stress as Silvia takes the audience through the strategies and tools needed to use stress as an advantage to boost performance.	
16:45 – 17:00	**Closing remarks** *Dan Atkinson & Steven McBurnie*	
17:00	**Conference close**