

*Agenda*  
**Wrap Users & Smart Technology Conference**

23rd June 2008, Crowne Plaza, Glasgow

- 08.30 Registration
- 08.50 Chairman's Opening Remarks  
**David Rowley**  
*Director*  
**NEW ADVISER LTD**
- 09.00 **The Seven Most Important Things you Need to Know about Technology Today**  
**Joel Bruckenstein**  
*Financial Advisor & Publisher*  
**VIRTUAL OFFICE NEWS**
- 09.35 **Technology – How Important is it Anyway?**  
**Gillian Hepburn**  
*Business Development Manager*  
**STANDARD LIFE**
- 10.05 **Platforms Before, During and After TCF and the RDR: Practical Consequences for Providers, Advisors and Investors**  
**Peter Jordan**  
*Head of Platform Marketing*  
**SKANDIA**
- 10.45 Morning Break & Refreshments
- 11.00 **Comparing Bells & Whistles: Continuous Due Diligence Technology Selection**  
**David Moffatt**  
*Group Executive*  
**IFDS**
- 11.35 **Overlaying Common Sense: Issues and Limitations of Current Financial Planning Tools**  
**Ian Thomas**  
*Head of Marketing*  
**AXA DISTRIBUTION SERVICES**
- 12.10 **Strengthening Client Relationships and Building Your Brand Using a Wrap Platform**  
**Malcolm Coury**  
*Managing Director*  
**MONEY WISE**
- 12.40 **PANEL DISCUSSION: How do the Different Platforms Stack Up?**  
Moderator: **David Taylor**, *Partner*, **ORGANISATION CONSULTING PARTNERSHIP**  
*Panel:*  
**Ian Thomas**, *Head of Marketing*, **AXA**  
**Glen Sweet**, *Head of Sales*, **TRANSACT**  
**Hugo Thorman**, *Executive MD*, **ASCENTRIC**
- 13.15 Lunch

- 14.15 **The Thorny Question of Charging**  
**Clive Waller**  
*Senior Partner*  
**CWC RESEARCH**
- 14.55 **Drive Less Traffic to Your Web Site and Get More “A” Clients as a Result**  
**Dennis Hall**  
*Chartered Financial Planner & Founder*  
**YELLOWTAIL FINANCIAL PLANNING LTD**
- 15.40 Afternoon Break & Refreshments
- 15.50 **How to Maximise the Effect on an Advice Practice of Adopting Platforms:**  
**CASE STUDY**  
**Alan Dick**  
*IFA*  
**FORTY TWO FINANCIAL PLANNING**
- 16.20 **What’s Happening in the USA: Commoditised Advice, Silver Surfers, X-Box Generation and the Threat from the Net**  
**Mike Linskey**  
*Director*  
**FINCISION**
- 16.50 **PANEL DISCUSSION: The Role of Advisors**  
Moderator: TBC  
*Panel*  
**Dennis Hall, YELLOWTAIL FINANCIAL PLANNING LTD**  
**John Martin, PRAEMIUM**  
**Alan Dick, FORTY TWO FINANCIAL PLANNING**
- 17.20 Chairman’s Closing Remarks
- 17.25 End of Event