Octopus Live in the Capital 2024

Agenda

The team are looking forward to welcoming you to our flagship estate planning event on 12 September at the Outernet venue. Keep an eye on your email inbox where you'll receive a link to sign up for the workshops a few weeks before the event.

09:15–10:00

Registration and breakfast

10:00–10:05

Introduction and welcome
Kristy Barr (Octopus Investments)

10:05–10:25

CEO keynote speech
Simon Rogerson (Octopus Investments)

10:25–11:10

Fireside chat: 'Tax planning best practice: adapting to a new government'
John Barnett and Emma Heelis-Adams, (Burges Salmon)

11:10–11:55

Fireside chat: 'The future of later-life and death planning'
Chris Carr (Octopus Legacy) and Tish Hanifan (SOLLA)

11:55–12:05

Pre-workshop introduction: 'Demystifying Business Relief: background and key principles'
Camilla Wilkes (Octopus Investments)

12:05–13:00 Lunch

13:00–13:45

Workshop 1: Approaching estate planning conversations with your clients
Martin McDermott and Colin Bramhall (Octopus Investments)

1. Learn how to initiate the estate planning conversation with your clients.
2. Understand the benefits and drawbacks of each estate planning option for your clients.
3. Understand how to engage clients and the next generation in the estate planning process.

Workshop 2: Smart solutions to grow your advice business
Joe Kerr and Jim Cavey (Octopus Investments)

1. Gain the tools you need to grow your advice business using different tax planning angles.
2. Identify who in your client bank could benefit from Business Relief investments.
3. Build a deeper understanding on specific angles ranging from maximising RNRB, clients who sold a business, trust planning and more.

13:55–14:40

Workshop 3: Streamlining estate planning due diligence and suitability
Chris Jones, Ewoud Karelse and Matthew Connell (DDHub/Evelyn & Partners/Personal Finance Society)

1. Unlock industry-wide insights from over a year of Consumer Duty, empowering you to streamline operations while ensuring good client outcomes.
2. Master the art of balancing suitability and risk — learn how to navigate key risk considerations and how educating clients can get planning opportunities over the line.
3. Equip yourself with actionable tools and strategies to enhance your research and due diligence processes, enabling you to efficiently sift through the market, deliver suitable recommendations, and maintain a robust case file.

Workshop 4: PI insurance myth-busting
Josh Upil (Onyx Insurance)

1. Understand the way that the Professional Indemnity (PI) market and landscape is changing.
2. Learn about key underwriting considerations and what you can do to prepare for them.
3. Understand how to keep clear evidence to show underwriters.

14:50–15:35

Workshop 5: Mastering Power of Attorney guidance
Tish Hanifan (SOLLA)

1. Increase your knowledge about what Powers of Attorney can and can't do.
2. Understand Power of Attorney in the context of Consumer Duty and client vulnerability.
3. Learn what is best practice in how to work with your client's family members.

Workshop 6: Building legacies: estate planning and executor essentials for you and your client
Chris Carr (Octopus Legacy)

1. Uncover the hidden financial and practical pitfalls of not preparing for death — because it's about more than just taxes!
2. Demystify the role of an executor and learn how to guide clients in making an informed choice about who to select, including what support is available to you and your clients.
3. Gain practical techniques to help clients build their estate plans, and discover how this can also add value to your business.

Workshop 7: Does purpose lead to profit?
Lucy Ronan and Edward Finney
(Octopus Investments)

1. Learn how to navigate the world of responsible investment.
2. Gain tools on how to make responsible investment simple.
3. Gain tips to understand how there doesn't need to be a trade-off between doing good and making money.

15:35–16:00 Afternoon tea break

16:00–16:45

Plenary session: 'Meet the fund managers: AIM and unquoted investments for estate planning'
Richard Power and Ed Fellows
(Octopus Investments)

16:45–17:25

Keynote speech: Sir Clive Woodward OBE

17:25–17:30

Closing speech: Kristy Barr (Octopus Investments)

17:30–19:00 Drinks