

# AGENDA

**Titanic Hotel Belfast, 6 Queen's Road, Belfast BT3 9DT**

- **12.00 noon** Registration opens with lunch served on arrival
- **12.30pm** **Secret Sunrise**  
**Awaken your mind and unleash your creativity**  
 This innovative session will take you on an immersive experience using wireless headphones to relax and energise you ready for the afternoon ahead.
- **12.50pm** **Danni Hewson, Host – AJ Bell**  
**Welcome and introductions**
- **1.00pm** **Kenny Boyd, Business Development Manager – AJ Bell Investcentre**  
**What's new at AJ Bell: financials, developments and D&I**
- **1.10pm** **Laura Suter, Head of Personal Finance – AJ Bell**  
**Don't forget about Lisa!**  
 In this whistlestop session, Laura will provide an update on the Lifetime ISA, reporting on its uptake since launch back in 2017. She'll be revealing some insight on usage and funding levels before highlighting key points to be aware of to ensure your clients aren't missing out on important allowances!
- **1.30pm** **Marion O'Donnell, Associate Director – Fidelity International**  
**Climate investing and decarbonisation**  
 In this session, Marion will provide a brief overview of human-induced climate change and how investors can contribute to reaching the goals of the Paris Agreement.
- **2.00pm** **Coffee break**
- **2.20pm** **Rachel Vahey, Head of Policy Development – AJ Bell**  
**Financial Family Planning**  
 In this one stop shop Rachel will provide some useful tips to ensure you are fully informed on how to best use all the family allowances, and ensure the taxman doesn't trip you up along the way. A 30-minute packed talk that will include a look at pension planning around the Higher Income Child Benefit Charge and tax-free childcare, using spousal transfers to maximise allowances, and Junior ISAs and Child Trust Fund opportunities. A family planning session for finances and one not to be missed.
- **2.50pm** **Cathy Brennan, Founder, Financial Coach – Resourceful Planner**  
**Who's fooling who?**  
 With 25 years of financial services experience under her belt, Cathy knows only too well the challenges of climbing the ladder in a pressurised environment. Many women find themselves working and building the stepping stones to leadership roles and success only to fall down or backtrack, and not always owing to a lack of opportunity, but rather to a lack of self-confidence and being held hostage to imposter syndrome! Cathy will explore the dangers of this trait and look at why we allow ourselves to be driven by fear. Taking this a little further, Cathy will also look at the effects limiting our own beliefs can have on our attitude to success. Why are we our own worst enemy? It's time to adjust your mindset and progress your life journeys to the next level.
- **3.10pm** **Cor Hutton, Founder – Finding your Feet**  
**I'm back!**  
 Cor was given just a 5% chance of survival in 2013 after an irritating cough turned into sepsis. Against all odds, she lived – but doctors were forced to amputate her hands and legs in the process. With a clear goal of improving perceptions and conditions for disabled people, changing the boundaries and removing the stigma of being 'different' whilst raising money to support others, Finding your Feet was born.  
  
 As our charity partner this year, Cor will tell her heart-warming story and update us with her recent antics and news following her double hand transplant. Be ready to laugh and cry – just don't forget your tissues!
- **3.50pm** **Drinks, lunch and networking**



Danni Hewson



Kenny Boyd



Laura Suter



Marion O'Donnell



Rachel Vahey



Cathy Brennan



Cor Hutton