

# AGENDA

## Fidelity International HQ, 4 Cannon Street, London EC4M 5AB

- 11.15am Registration opens with brunch served on arrival
- 12.00 noon Danni Hewson, Host – AJ Bell  
**Welcome and introductions**
- 12.10pm Alison Mollard, Head of Sales South – AJ Bell Investcentre  
**What's new at AJ Bell: financials, developments and D&I**
- 12.20pm 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!
- 12.40pm Helena Morrissey – AJ Bell  
**The Diversity Project and 30% Club**

In this honest talk, Helena will discuss her early years and experiences in financial services and how she raised nine children whilst progressing her career to leadership status. Helena will discuss why she decided to set up the 30% Club, and more recently the Diversity Project, and the positive impact these initiatives are having.
- 1.10pm Coffee break
- 1.30pm 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.
- 2.00pm 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.
- 2.30pm Alena Kosava, Head of Investment Research – AJ Bell Investments  
Aela Cozic, Associate Director, Sustainable Investing & Assistant Portfolio Manager – Fidelity International  
**Fireside chat – Is ESG profitable?**

In this fireside chat our guest speakers will work through the minefield of ESG solutions available, discuss market trends, and address the out-performers and under-achievers. There'll be a topical chat about greenwashing and the regulator's proposals for protecting consumers, and we'll invite any questions along the way.
- 3.00pm 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 is going to return 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!
- 3.30pm Drinks and networking



Danni Hewson



Alison Mollard



Laura Suter



Helena Morrissey



Cathy Brennan



Aela Cozic



Rachel Vahey



Alena Kosava



Cor Hutton