



13<sup>th</sup> October: The Emirate Stadium, London  
20<sup>th</sup> October: National Motorcycle Museum, Solihull Birmingham

0830 - 0915	Registration
0915 - 0930	Chairman's Introduction & Welcome
0930 - 1000	Keynote Speaker 1
1000 - 1030	Keynote Speaker 2
1030 - 1050	Question & Answer Session
1050 - 1120	Refreshments in exhibition area
1120 - 1150	Workshop A + Workshop B
1150 - 1220	Workshop C + Workshop D
1220 - 1245	Refreshments in exhibition area
1245 - 1315	Keynote 3
1315 - 1345	Panel Session
1345 - 1500	Lunch in the exhibition area & close

## **Keynote Topics**

### **Keynote 1-Economic and market update**

***Ben Thompson, Legal & General***

What can we expect the market to look like over the next 2 or 3 years, and importantly which product sectors and structures of the market will not return in the short term? Can we expect green shoots of recovery or will 2010 be as difficult as 2009. Where will the broad opportunities be for the mortgage broker and in turn your clients?

### **Keynote 2-Regulation Update and the impact of RDR**

***George Higgins, Intrinsic Financial Services***

The retail distribution review could have a fundamental effect on how brokers run their business and deliver advice to their clients. Some commentators believe the impact of RDR could be worse than the recession itself. What are the potential implications of RDR and what can a broker be doing to prepare for it. What would happen in a proc fee free world?

### **Keynote 3- What is the winning formula**

***Paul Merrigan, Lifetime Mortgages***

Is it possible to generate significant income in the current market downturn? Get practical advice on how to implement the most effective business model to ensure that you are making the most of this recession and positioning your business in the best possible way to ensure that you are well placed for the oncoming challenges, and eventual upturn

**Workshop topics** (delegates will choose one topic from each stream)

**Stream one**

**(1) Effective marketing**

*Ian Giles, Ian Giles Consultancy*

How do you create the right impression for your clients? Are you doing enough to get yourself noticed? Have you thought about how you might be portrayed by your current and potential clients. Are you doing enough to demonstrate your expertise and specialism? Have you got the right contact network to help generate leads and referrals?

**(2) Client Management**

**(Birmingham) Mark Graves, Linear**

**(London) Nick Baxter, Baxters Business Consultants**

Selling just a mortgage to a client is no longer going to generate sufficient income for survival. Are you managing your existing client base effectively and getting the most from the customers you have already sold to. How can you set up an effective strategy to ensure you are maximizing your opportunities?

**Stream two**

Seizing the Opportunity-Diversification

Understanding the potential/barriers to entry, qualification requirements/client requirements for the following sectors

**(3) Protection and General Insurance**

**Stuart Mair, LV=**

There is still an enormous under provision of insurance cover in the UK which presents an obvious and accessible revenue stream from both existing and new clients. How do you identify the opportunity and how do you convert it into a sustainable income stream

**(4) Debt Management**

**(Birmingham) Phil Grady, Grant Thornton**

**(London) Gareth Neil, Grant Thornton**

The strains of the current economic downturn will be focusing your clients on the realities of their financial position and in turn this is giving you ample opportunity to help some of your clients restructure their finances. Helping clients alleviate pressure on mounting unsecured debt will put you in a great position to retain a client for life.

Find out how you can generate income in this increasingly important arena.

*Please note that this programme may be subject to change.*