

For investment professionals only

In pursuit of excellence: helping advisers build better businesses

23 May 2017, Holiday Inn Winchester

Conference agenda

08:30	Registration and breakfast	
09:00	Introduction and welcome	Lawrence Cook , Thesis Asset Management
09:15	Risk profiling: pitfalls and solutions	Rory Percival , Rory Percival Training and Consultancy Ltd
09:45	Pensions - the 2017 version	Mike Morrison , AJ Bell
10:15	Break	
10:30	Breakout sessions (one of four) <ul style="list-style-type: none">■ Compliance in practice: making it work for you■ Delivering an amazing client experience■ The practicalities of buying and selling IFA firms: managing the process to maximise the value and minimise the risks■ Sentimentalist cynic or cynical sentimentalist? Which is your manager and why does it matter?	Leon Thompson , Jigsaw Compliance Services Keith Hare , Benchmark Capital Roderic Rennison , Rennison Consulting Jonny Gamble , ARC
11:00	Breakout sessions (one of four) <ul style="list-style-type: none">■ Compliance in practice: making it work for you■ Delivering an amazing client experience■ The practicalities of buying and selling IFA firms: managing the process to maximise the value and minimise the risks■ Sentimentalist cynic or cynical sentimentalist? Which is your manager and why does it matter?	Leon Thompson , Jigsaw Compliance Services Keith Hare , Benchmark Capital Roderic Rennison , Rennison Consulting Jonny Gamble , ARC
11:30	Break	
11:45	The good, the bad and the ugly: UK equities	Giles Marriage , Thesis Asset Management
12:15	The further evolution of professional advice	Keith Richards , Personal Finance Society
12:45	Thanks and Q&A	Lawrence Cook , Thesis Asset Management
13:00	Lunch	

[Register now](#)

We look forward to welcoming you to our conference on 23 May in Winchester. For more information visit our [website](#), email events@thesis-plc.com, or call Sarah Hess on 01483 406 128.

Contact us

To find out how Thesis can deliver the right investment management services for your clients, please contact our business development team.

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