



The Financial
Services Forum

Events

April-July

2016

Corporate partners

BrightTALK™



SapientNitro™

JAYWING

Welcome to our Calendar for April to July 2016

We continue The Financial Services Forum's schedule of 2016 events with a number of seminars and breakfast briefings. The sessions scheduled through to July are detailed in this brochure. I hope you will be able to fix some of the dates in your diary.

As always, there is a variety of topics and discussions, covering the issues of greatest relevance and topicality for our membership community.

You will find events relevant to your current industry sector, but also seminars prepared for other interest groups. Please consider attending these too. There are lessons to be learnt from other sectors of the industry and opportunities to create business relationships with new companies and individuals.

Members attending these events have the opportunity to debate strategic thought-leadership as well as practical tips on marketing best practice.

In addition to our event programme, membership of The Forum also gives you access to our website. It offers access to timely, relevant, thought-leading content at a time that is convenient to you. I hope you benefit from the material it contains.

The Forum community continues to grow rapidly. If your colleagues are not currently benefiting from their own subscription, Online Membership is the perfect way to sample what we do. Please ask them to visit the website and take advantage of the trial membership, allowing them to download sector-specific marketing content and network with their contemporaries by sector, discipline and geographical region.

Through The Forum's events, website and communities, we aim to keep you fully-engaged with the rapidly changing world of financial services marketing.

I look forward to seeing you at our events in 2016 and discussing financial services marketing issues on our new website.



David Cowan
Managing Director
The Financial Services Forum



Schedule Key

E

Event is open to Executive Members

Executive Membership is for senior industry executives who are either responsible for, or directly influence, their organisation's marketing strategy; typically, they will be at director level or equivalent.

A

Event is open to Associate Members

Associate Membership is for those who are responsible for the execution of their organisation's marketing strategy; typically, they will report to a director.

P

Event is open to Practitioner Members

Practitioner Membership is for directors and partners of agencies and consultancies within the advertising, direct marketing, digital, media planning and buying, design, branding, sponsorship, sales promotion, PR, research and evaluation fields.

Dates, timings and speakers for events may change. For the latest details, please visit the website: www.theforum.co.uk

Tuesday 19
**Direct & Digital
 Marketing**

E A

Digital Content 2.0

Delivering a clear content strategy differentiates the winners and losers in today's noisy market place. How well do you deliver an omni-channelled content experience to your clients? Technology and data allows us to personalise our message and automate to achieve instant 1:1 marketing. How are your clients and consumers responding to this new content approach? And how are marketers tailoring their content for the different digital channels e.g. video, email, social, infographics, and websites? Regardless of how sophisticated your content strategy is today, you'll be able to learn how others are developing their strategy around digital content. Speakers include Simon Bennison, Head of Strategy at Caliber.



Tuesday 26
General

E A P

When Push Comes to Nudge

Bridging the gap between attitude and action is one application of behavioural economics; but we are also more aware that consumers are not always rational and decisions change the way questions are framed. In this session we look at how the themes and ideas behind behavioural economics are becoming more natural and how adoption of techniques have become more mainstream.

Is there a marketing paradox as we slave to uphold the mantra 'understanding the customer' while the customer doesn't necessarily know what they want themselves? Speakers include Paul Craven.

Wednesday 27
**Private Banking
 & Wealth
 Management**

E

Digital Content – How to Engage the HNW Individual

How do you engage the HNW client through new channels? Content is the big buzzword in marketing. How can a fully thought through content strategy enhance the customer experience? If you fail to optimise your content the chances are you will be left behind. What are the key levers to develop and implement a content strategy that delivers on your business goals? Speakers include Seb Dovey of Scorpio Partnership and Martin Wake of Sticky Content.



Thursday 28
**General
 Insurance**

E

The Internet of Things

The Internet of Things offers a chance to redefine many sectors and accelerate the journey to productivity and growth. A key driver of productivity and growth in the next decade, the Internet of Things will accelerate the reinvention of sectors. What will the impact be on General Insurance? Are companies prepared to take full advantage of this opportunity? What technology currently exists and what is in the pipeline for the next five years? How will this impact insurers and how can this technology be implemented to best effect? What are the implications and challenges for the supply chain? Speakers: Dan White, Senior Partner for Insurance, Ninety Consulting; Oliver McGuinness, Product Development Director, Innovation Group Limited; Jon Carter, UK Head of Business Development – Connected Home, Deutsche Telekom AG.

... without a shadow of doubt, the most helpful and progress of all industry groups that I have ever used. It continues to offer a variety of fresh, insightful and well thought through sessions ...

David Cooper, Group Marketing & Distribution Director, Just Retirement



Thursday 5
Brand Strategy

E A

Do Strong Brands Really Save You From Commoditisation?

In theory, brands are the opposite of commodities. People positively choose them. You can charge more for them. They create more loyalty. But sometimes it seems different rules apply in financial services. While strong brands clearly provide important credibility and reassurance, consumers find it painfully difficult to see any real differentiation between most big banks, insurers, or asset managers. Does brand only work for small or niche players? Our panel of experts will discuss.

Thursday 12
General

E

Senate Group – Drinks Reception

The first meeting of our Senate Group. Held at the BT Tower, this invite-only event will combine a keynote speech from an industry leader, with an opportunity to meet and network with the most influential financial services marketers in the UK today. Following the launch of the 'Marketing Leaders List' at our Annual Members' Dinner in November 2015, this is the first in a series of three events this year where we bring together the key individuals leading and shaping financial services marketing.

Tuesday 17
General

E A P

Behaviours That Help Achieve Strategic Goals

Having strategic goals is an important part of running a business, however if your organisation's behaviours are not aligned to your goals they are doomed to failure. The challenge for leadership is to determine the actual behaviours that run through a business and, if they are not aligned to the goals, change them. Speakers include David Rush of Alderbrooke.

Thursday 19
General Insurance

E

Lessons from Love: Acquisition and Relationship Building

What lessons can the data-driven D2C Insurance world learn from other digital-driven businesses such as online dating sites? How do you really get to understand your customers and match them with the right products to produce a linear association between two variables? Perhaps not the subject for a candle lit dinner, but some fascinating insights into making data work for you in different ways.

FWD

Thursday 26
Corporate Communication

E A

Will the FCA's FAMR Proposals Close the Advice Gap?

Politicians, regulators, and the industry agree that there is an advice gap. The Financial Advice Market Review seeks to answer how to make financial advice work better for consumers. We bring together a panel of experts to focus on whether FAMR will really close the advice gap.



AWARDS
FOR MARKETING
EFFECTIVENESS
2016

ENTRY DEADLINE

16 JUNE 2016

www.thefsforum.co.uk/awards

#FSFAwards2016

Thursday 9
General

E A P

Digital Futures

Marketing is in a state of flux. With shifting consumer behaviour, channel proliferation and technological advancement all converging, we are entering the Age of the Customer – where customers are in control. For brands this is simultaneously an age of unprecedented opportunity and an age of unprecedented complexity and exponential change. The panel will investigate the top trends shaping marketing in a digital world and debate what marketers need to do to ensure brands thrive in the Age of the Customer.

Wednesday 15
Corporate
Investment
Banking

E

Optimise your Brand Budget in a Lean (or Prudent?) Cost Environment

With the budgets ever under the microscope, how do you ensure that you have the right marketing strategy in place to maximise spend on your brand? The big ticket glory days of sponsorship and print may be under pressure, but you still need to support your marketing strategy by finding smarter solutions to maximise your budget. In this round table session, we take the opportunity to discuss with your peer group what is working best and how less cheque book grunt doesn't have to correlate with a less impact.

Tuesday 21
Life & Pensions

E

Pensions Tax Relief: What Now?

What is the verdict on Chancellor George Osborne's plan for pensions tax relief? Following this spring's Budget announcement, what are the implications for the retirement savings market? And what does it mean for the wider savings landscape? Do we now have the right tax incentives for broad-based pensions saving? How will employers and individuals react, and where are the marketing and business opportunities? Will the retirement saving gap start to narrow, and where should providers and the industry be focussing their efforts? From D2C, to adviser-based, to employer-centric models – what will be the winning pensions market strategies of the future? Our expert panel looks at the key issues.

Thursday 23
Asset
Management

E

Robo-Advice: The Rise of the Investment Machines

Is the future of investment advice robotic? BlackRock and Fidelity are among the asset managers looking at offering robo-advice services to investors in the UK, and many of the high street banks are also considering the potential of automated advice. Meanwhile Nutmeg, the online investment manager, has grown at a rapid rate and has attracted tens of thousands of clients. What are the opportunities and threats for asset managers? Could robo-advisers be the solution to the advice gap, and what will be the impact of these digital services on traditional advice and wealth management businesses? Our expert panel looks at the issues. Speakers include Jason Chapman of Willis Owen.

ACCUDELTA FWD

Tuesday 28
Retail Banking

E

Is Banking Too Complicated?

Customers often say that banking isn't simple enough. The industry is ranked below average for brand simplicity in an annual study by global consultants Siegel and Gale. Greater simplicity should mean a better brand experience and boost customer loyalty and recommendation. How can banks become more simple and therefore more trusted? Some, like First Direct, known for its customer service, and Metro Bank, with its focus on convenience, are among those doing the right things, but others make "everything harder than it needs to be", according to consumer respondents in the study. Siegel and Gale present their findings and client-side speakers give their views.

Tuesday 5
Private Banking
& Wealth
Management

E

How Does Your Client Strategy Compare with Other Major Private Banks?

What are the major global private banks doing in 2016 to improve their client service experience and to strengthen product innovation? What will be their segment focus and what measures are they taking to align their culture with client need?



Thursday 7
Mortgages

E

London Mortgages Forum

Business leaders from mortgage lenders, key distributors networks and other professional service providers in the UK mortgage community gather to debate some of the biggest challenges facing the industry. This event has been scheduled to fall on the morning of The British Mortgage Awards.



Thursday 14
General

E A P

Media Spaghetti

Are marketers being seduced by the new kids on the block? Traditional publishers have rushed to describe themselves as 'information distributors' whilst provider businesses are happy to call themselves 'content publishers'. What is going on? The emergence of new platforms and the rise of video consumption have both affected publishers in ways that couldn't have been foreseen. In addition to many other changes that wouldn't have been predicted even five years ago, they've given up control of distribution, made deals with the devil, and even entirely reimagined what the product is. Can publishers reclaim some of their traditional territory by demonstrating that they have evolved. Can they deliver engaged audiences through multi channels and still capitalise on traditional strengths of brand, customer engagement, content creation, reach, distribution, authority, and credibility?

... the most effective form of continuous professional development available to marketers in financial services. Nowhere else is it possible to access live information about best practise and engage in regular dialogue with leaders in our sector. I always encourage my team to attend these seminars – it is certainly time well spent ...

Alex Hammond, Head of Marketing and Communications, Kensington



Chairman

Keith Carby, Chairman and Chief Executive Officer, Caerus Capital Group

Members

Robin Bulloch, Managing Director, Lloyds Bank Retail, Lloyds Banking Group

Leslie de Chernatony, Professor of Brand Marketing, Aston Business School

Annie Coleman, Managing Director, Global Marketing Strategy, UBS Investment Bank

Lord Flight

Ken Hogg, Interim Head of PRA Compliance, Prudential

Peter Markey, Chief Marketing Officer, Post Office

Jo Parker, Chief Executive Officer, Chime Specialist & Teamspirit Group

Paul Pester, Chief Executive Officer, TSB

Anthony Thomson, Founder, Metro Bank and Atom Bank. Chairman, The Financial Services Forum and National Skills Academy for Financial Services

Patrick Waldron, Chief Executive, Fintrax

Asset Management

Chairman

Piers Currie, Group Head of Brand, Aberdeen Asset Management

Steering Committee

Klare Iveson, Director of Marketing, Fidelity Worldwide Investment

Marcus Bolitho, Head of Marketing, Old Mutual Global Investors

James Cardew, Global Head of Marketing, Schroders

Caroline Haley, Director, First Quartile (Part of FWD)

Anne-Marie McConnon, Marketing Director, BNY Mellon Investment Management

Scott Stevens

Nuala Walsh, Head of Global Client Relations, Standard Life Investments

Brand Strategy

Chairman

Lucian Camp, Principal, Lucian Camp Consulting

Steering Committee

Ben Rhodes, Head of Marketing & Commercial Strategy, Royal Mail

Sue Simpson, Head of Brand, NS&I

Annabel Venner, Global Brand Director, Hiscox

Corporate & Investment Banking

Steering Committee

Marcello Calabro, Global Head of Communications, UniCredit Corporate & Investment Banking

Lisa McBreen, Head of EMEA Marketing, Morgan Stanley

Sarah Speake, Head of Brand and Advertising, EMEA, Barclays Investment Bank

Corporate Communications

Chairman

Tony Langham, Chief Executive, Lansons

Digital & Direct Marketing

Chairman

Dominic Traynor, Head of Digital Marketing, M&G Investments

Steering Committee

Ian Cooper, Head of Marketing Distribution, SunLife Direct

Bradley Gamage, Director, Financial Services UK, SapientNitro

Heather Smith, Digital Director, Aviva

General Insurance

Chairman

Jaz Saggi

Steering Committee

David Lundholm, Director, Group Corporate Development, BGL Group

Sherdin Omar, Senior Manager, Insurance Risk and Actuarial Services, Ernst & Young

Hannah Squirrel, Marketing Director, Insurance, Tesco Bank

Sam Taylor, Brands Director, Direct Line Group

Life & Pensions

Chairman

David Dunn, Director, Making Sense of Retirement

Steering Committee

Alastair Black, Head of Customer Income Solutions, Standard Life

David Cartwright, Head of Insight & Consultancy (Wealth & Protection) Defaqto

Ken Hogg, Solvency II Director, FSC, Gibraltar Financial Services Commission

Tom McPhail, Head of Pensions Research, Hargreaves Lansdown

Victoria Wentworth, Chief Customer & Strategy Officer, Wesleyan Assurance

Mortgages

Chairman

Bharat Sagar, Executive Chairman, AE3Media

Steering Committee

Peter Brodnicki, CEO, Mortgage Advice Bureau

Peter Curran, Managing Director, Financial Services, Countrywide

Peter Hill, CEO, Leeds Building Society

Mike Jones, Director of Intermediaries, Lloyds Banking Group

Roland McCormack, Mortgage Intermediary Director, TSB

Stephen Smith, Director, Housing Partnerships, Legal & General

Private Banking & Wealth Management

Chairman

John Elder

Steering Committee

Kirsten Burt, Executive Director, Head of Marketing, UBS Wealth Management

Suzanne Collins, Head of Marketing UK, Coutts & Co

Aidan Lisser, Chief Marketing Officer, Investec Wealth & Investment

Jane Parry, Head of Marketing & Communications, Canaccord Genuity

Retail Banking

Chairman

Clive Kornitzer, Group Chief Operating Officer, One Savings Bank

Steering Committee

Brian Brown, Head of Insight, Banking & GI, Defaqto

Danyaal Hasan, Executive Director, Head of Banking Products, Coutts

Nicholas Millar, Director, Strategy & Consumer Insight, VocaLink

Lisa Wood, Chief Marketing Officer, Atom Bank plc

Simon Watts, Brand Portfolio Strategy Director, Group Brands & Marketing, Lloyds Banking Group



The Financial Services Forum

1st Floor, 251 Pentonville Road, London N1 9NG

020 7449 9000

info@thefsforum.co.uk

www.thefsforum.co.uk

@TheFSForum

Corporate partners

BrightTALK™ BT  SapienNitro™ JAYWING