



The Financial  
Services Forum

# Calendar of Events

Sept-Dec 2021



## What's coming up

Take a look inside and register for our upcoming webinars, half-day conferences and roundtable discussions.

### Including:

- 23 Sept:** Post-pandemic Brand Strategy Supercharger
- 21 Oct:** Asset Management Focus Half-Day
- 04 Nov:** The Tech-Driven Customer Journey
- 02 Dec:** Behavioural Science in Life and Pensions

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# A message from David Cowan

**This Autumn, we are looking at a return to live events. To reflect the changing work patterns, we will be running half-day conference-style events for our special interest groups, broken down into multiple thematic sessions as well as a programme of webinars and our two invitation-only Summits.**

The half-day conferences will take place in-person with a hybrid element so those who are unable to join us or don't feel comfortable attending events yet won't miss out. It's worth adding that we're currently reviewing and considering a range of measures to ensure we are accommodating all of our members as we begin to return back to in-person events.

Whilst there is a clear appetite from some groups to meet up face to face once again, we recognise that company policies and individual inclination to travel and meet inside differs and will continue to do so. All our live events will have strict protocols for attending which we will circulate ahead of each meeting so we can ensure as risk free an environment as possible whilst continuing to facilitate meaningful interactions between members.

The conferences will be complemented by a mixture of webinars, studio interviews and roundtables, creating a busy yet versatile Autumn schedule. I'm also pleased to announce the impending launch of a new video series 'Disruptors', spearheaded by Alex and filmed in our studios. Details of this will be available in the coming weeks.

Additionally, we are really excited to welcome members to the first physical awards ceremony since 2019 for the Annual Members Dinner and the Awards for Marketing Effectiveness which will take place on the 23 November 2021 at the stunning Church House in Westminster. This year will mark 20 years of the Awards for Marketing Effectiveness, so we're hoping to make this year's celebration one to remember. Tickets will be available to purchase from late-September onwards, via the dedicated awards website.

We have some fantastic topics lined up for the coming months, including a Post-Pandemic Brand Strategy Supercharger conference in September, the much-heralded return of our flagship Executive Summit and a technology and customer experience focused half-day. Please take some time to read through the calendar and register for the events of interest to you and your team.

We are especially looking forward to a return to live events and welcoming everyone to a Forum event in person. We will not be short of subject matter! On behalf of the Financial Services Forum team thank you for your support over this challenging period.

# Who's Who in the Forum Team

We asked the Forum team, what is your favourite brand or marketing campaign?



**David Cowan, Managing Director**

Email: [dc@thefsforum.co.uk](mailto:dc@thefsforum.co.uk)

*"I love the YouTube trailer ads in 5 seconds. How to hook you before your goldfish brain switches off"*



**Jasjit Sandhu, Membership Engagement Manager**

Email: [Jasjit.sandhu@incisivemedia.com](mailto:Jasjit.sandhu@incisivemedia.com)

*"Apple, The Whole Working from Home Thing"*



**Ali Brancal, Membership and Sales Executive**

Email: [ab@thefsforum.co.uk](mailto:ab@thefsforum.co.uk)

*"Nike or Apple - and M&S food around Christmas"*



**Alex Sword, Editor**

Email: [as@thefsforum.co.uk](mailto:as@thefsforum.co.uk)

*"Estrella #TheLittleThings and the Corsa Hide and Seek advert"*



**Sabrina Shilstone, Senior Event Coordinator**

Email: [Sabrina.shilstone@incisivemedia.com](mailto:Sabrina.shilstone@incisivemedia.com)

*"Financial services brand would be Robeco – always focused on sustainable investment!"*



**Lucy Wilson, Conference Producer**

Email: [lw@thefsforum.co.uk](mailto:lw@thefsforum.co.uk)

*"Cadbury's Eyebrows!"*



**Jasmine Burnham, Marketing Manager**

Email: [jb@thefsforum.co.uk](mailto:jb@thefsforum.co.uk)

*"It is a really close tie between Ribena, You Can't Get Anymore Ribenary and Barry the firstdirect platypus"*

Key: **P** Practitioner **A** Associate **E** Executive



# August

<b>TITLE</b>	<b>Understanding and Executing Personas in Digital for 2021 and Beyond</b>
<b>DATE / TIME</b>	26 Aug – 10:30-11:30
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	General
<b>MEMBERSHIP</b>	<b>E A P</b>
<b>SYNOPSIS</b>	<p>The past 12 months have seen a huge impact on financial services, affecting consumers and organisations alike. Despite this turbulence, we have seen that the right strategies, focusing on key priorities and investment in customer experience are enabling companies to be more agile and quickly respond to the rapid changes in customer behaviour and new digital customer demands.</p> <p>Engaging customers via the best digital content with the right message at the right time has always been a goal. In 2021 customer expectations are at an all-time high and attention is hard to earn in a world where digital is now the primary interaction channel.</p> <p>Given that bespoke engagement enhances customers' lives, optimises loyalty and grows your brand value, how can Financial Services brands stay relevant and deliver digital moments that stand out from the crowd?</p> <p>A powerful content management system is just the beginning. True customer insight is achieved when you can combine customer data, analytics, AI, and marketing automation capabilities to nurture customers throughout their journey with personalised content in real-time, across any channel. So, where do you start?</p> <p>Join Sitecore and discover how to create standout personalised customer experiences at scale with a single platform to handle any disruption.</p> <p><b>Speakers:</b>  <b>Santosh Sethumadhavan</b>, Global Head of B2B Marketing Programmes, Commercial Banking &amp; Global Banking &amp; Markets, HSBC Bank plc  <b>Mike Plimsoll</b>, Snr. Director, Industry Strategy &amp; Marketing, Sitecore</p>
<b>SPONSOR</b>	 <b>SITECORE</b>
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/save-the-date-a-webinar-in-partnership-with-sitecore/">https://thefsforum.co.uk/events/save-the-date-a-webinar-in-partnership-with-sitecore/</a>



<b>TITLE</b>	<b>Marketing Evolution in Response to Regulation</b>
<b>DATE / TIME</b>	9 Sept – 09:00-10:00
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	Insurance
<b>MEMBERSHIP</b>	<b>E A P</b>
<b>SYNOPSIS</b>	<p>With new regulation from the FCA to prevent price walking from 2022, the general insurance industry is set to see major change. The new pricing remedies/rules will affect consumer behaviour, prices and profitability across the sector, from price comparison sites to brokers and insurers.</p> <p>This event will look to the opportunity this could present for marketers in an evolving market.</p> <p>This change to regulation will be relevant to marketers beyond general insurance as we ask:</p> <ul style="list-style-type: none"> <li>• How do you position your brand and evolve with regulation?</li> <li>• How will new rules affect switching behaviour, and could brands see increased consumer loyalty?</li> <li>• How should marketing departments develop and adapt their strategies in response to regulatory changes?</li> <li>• Will valued-added services and brand positioning become more important in the retail space?</li> </ul> <p><b>Speakers:</b>  <b>Sam White</b>, CEO, Freedom Services Group  <i>Additional speakers to be confirmed</i></p>
<b>REG LINK</b>	<a href="https://theforum.co.uk/events/marketing-evolution-in-response-to-regulation/">https://theforum.co.uk/events/marketing-evolution-in-response-to-regulation/</a>

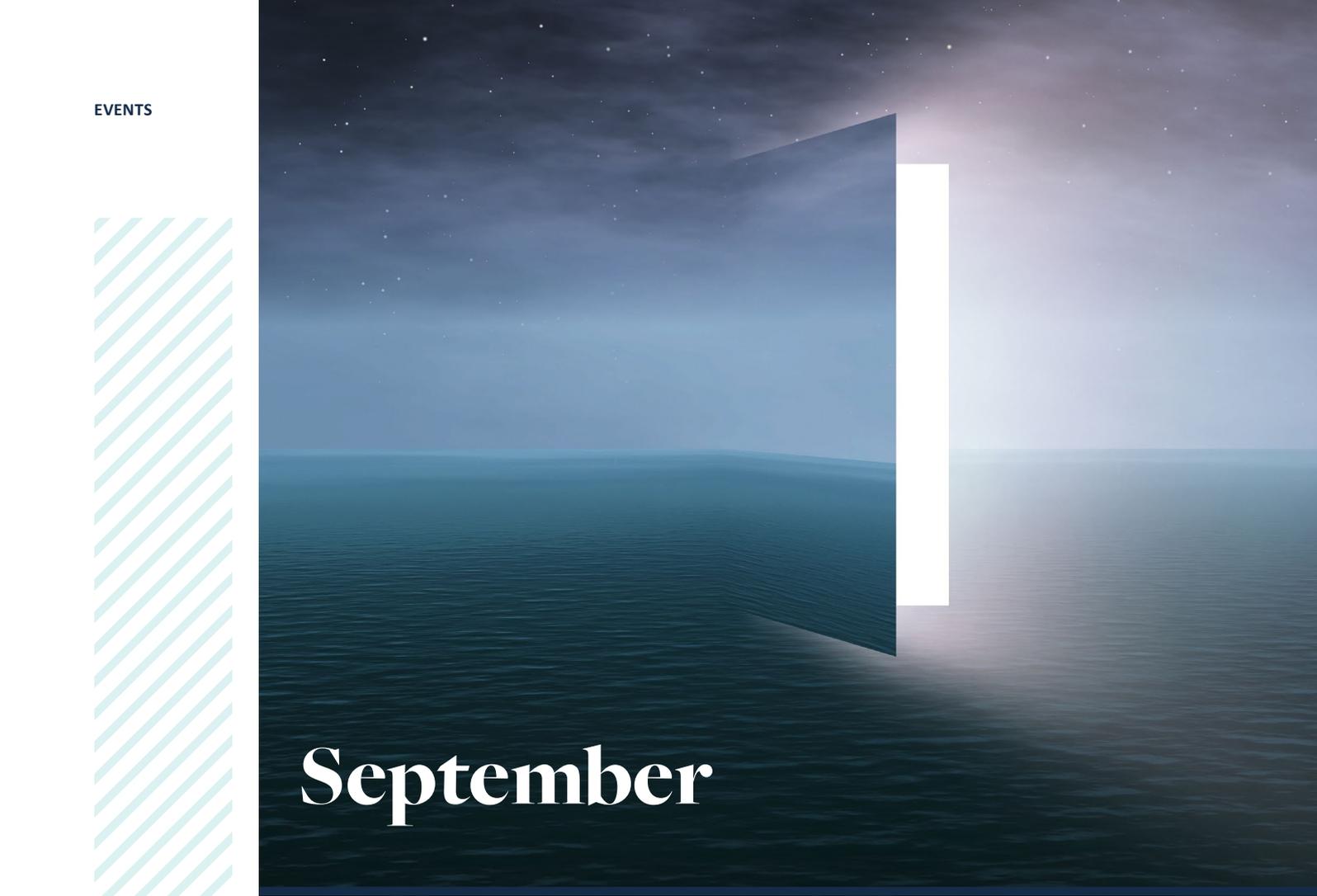
# September

<b>TITLE</b>	<b>How to Successfully Implement Slick Self-Service for your Customers</b>
<b>DATE / TIME</b>	14 Sept – 09:00-10:00
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	General
<b>MEMBERSHIP</b>	<b>E A P</b>
<b>SYNOPSIS</b>	<p>Join our webinar on 14 September at 9am to explore how banks can create slick “self-serve” customer journeys.</p> <p>In this webinar, you’ll discover how best to approach the design of such journeys for all types of consumer – creating inclusive services for everyone, regardless of background, age, technical ability, financial awareness and location.</p> <p>This session will also explore how we worked with the DVLA to digitalise Direct Debit payments for Vehicle Excise Duty (car tax).</p> <p><b>Speakers:</b>  Richard South, Director, Target Group  Beth Collins, Solutions Lead, Target Group</p>
<b>SPONSOR</b>	
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/how-to-successfully-implement-slick-self-service-for-your-customers/">https://thefsforum.co.uk/events/how-to-successfully-implement-slick-self-service-for-your-customers/</a>



# September

<b>TITLE</b>	<b>Who Will Win the Fight for the £180 Billion of Lockdown Savings?</b>
<b>DATE / TIME</b>	16 Sept – 10:00-11:00
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	General
<b>MEMBERSHIP</b>	<b>E A P</b>
<b>SYNOPSIS</b>	<p>The Bank of England says that consumers have built up around £180 billion in additional savings during the pandemic.</p> <p>At the moment, most of that is sitting in current accounts and short-term savings. The big question as lockdown restrictions ease is whether people are going to want to hang onto those savings, or if we're facing a "spend, spend, spend" mini-boom.</p> <p>Savings and investments firms will be going head-to-head against holidays and home improvements in the battle to capture a share of that £180 billion. In this interactive session, we will focus on consumer well-being, looking at which consumer groups are prospering and which ones are still struggling, and how people's priorities have shifted over the course of the pandemic.</p> <p><b>Speaker:</b> Toby Clark, Director of Research EMEA at Mintel <i>Additional speakers to be confirmed</i></p>
<b>SPONSOR</b>	
<b>REG LINK</b>	<a href="https://theforum.co.uk/events/disruptor/">https://theforum.co.uk/events/disruptor/</a>



# September

<b>TITLE</b>	<b>Post-Pandemic Brand Strategy Supercharger</b>
<b>DATE / TIME</b>	23 Sept – 09:00-12:00
<b>EVENT TYPE</b>	Hybrid half-day conference – Location TBC
<b>GROUP</b>	Brand Strategy
<b>MEMBERSHIP</b>	<b>E A</b>
<b>SYNOPSIS</b>	<p>As we emerge from a prolonged period of restrictions and isolation, and as we move to a hybrid way of working, marketing and living, changes and challenges within Financial Services marketing have been brought into sharp focus.</p> <p>Brand strategy is more important than ever as financial services marketers start to enter the uncharted waters of a post-pandemic world.</p> <p>The FSF Brand Strategy Supercharger is a half-day conference which will encourage you to think creatively about your future brand strategy and to reflect on your learnings from recent events.</p> <p>We will look at the role of and developments in brand tracking, how brand strategy translates in digital, repositioning, and the “purpose” of it all.</p> <p>Join us to learn, connect with your peers and feel confident to transform your organisation’s brand strategy.</p> <p><b>Speakers:</b>  <b>Simon Bailey</b>, Global Head of Brand, abrdrn  <b>Courtney Waterman</b>, Head of Creative Marketing, Ninety One  <i>Additional speakers to be confirmed</i></p>
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/post-pandemic-brand-strategy-supercharger/">https://thefsforum.co.uk/events/post-pandemic-brand-strategy-supercharger/</a>



# September

<b>TITLE</b>	<b>Fintech: Leading the Race to Zero with Natural Capital Solutions</b>
<b>DATE / TIME</b>	28 Sept – 09:00-10:00
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	Fintechs
<b>MEMBERSHIP</b>	<b>E A</b>
<b>SYNOPSIS</b>	<p>With momentum building to COP26 in Glasgow in November, the eyes of the world are on the world's leading financial centres, such as the City of London, to lead the way to achieve a zero-carbon future. In this session we're looking at the Fintech innovators providing natural capital solutions and investment opportunities that can help us get there. All of which are examples of 'nature-positive' paths, that according to the World Economic forum could create US \$10trillion of economic growth and 395 million jobs by 2030.</p> <p>Whilst climate initiatives and carbon reduction may be receiving the current headlines, the biodiversity crisis is intertwined. Which is why there is increasing interest in investing in harnessing and preserving Natural Capital as a solution to reducing emissions, restoring biodiversity, and boosting sustainable economic growth and job creation.</p> <p>Come and meet the purpose-led fintechs that are providing technically-led solutions with positive impacts for the planet and society as their core measures for success. We'll be hearing from those securing investment in nature at scale for financial institutions through to investment apps for consumers, with funds rated against the SDGs and the ability to calculate your own carbon footprint. All of which provide a healthy financial return as well as positive natural and social returns.</p> <p>Join us to hear the very latest in how finance, technology, vision and collaboration will help achieve the race to net zero and protect our planet and society.</p> <p><b>Speakers</b>  James Clifton, Co-founder &amp; CSO, Cultivo  Duncan Grierson, CEO, Clim8Invest  Jill Jackson, CEO, The Big Exchange  <b>Chair:</b> Fiona Couper, CMO, Teamspirit</p>
<b>SPONSOR</b>	
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/fintech-leading-the-race-to-zero-with-natural-capital-solutions/">https://thefsforum.co.uk/events/fintech-leading-the-race-to-zero-with-natural-capital-solutions/</a>

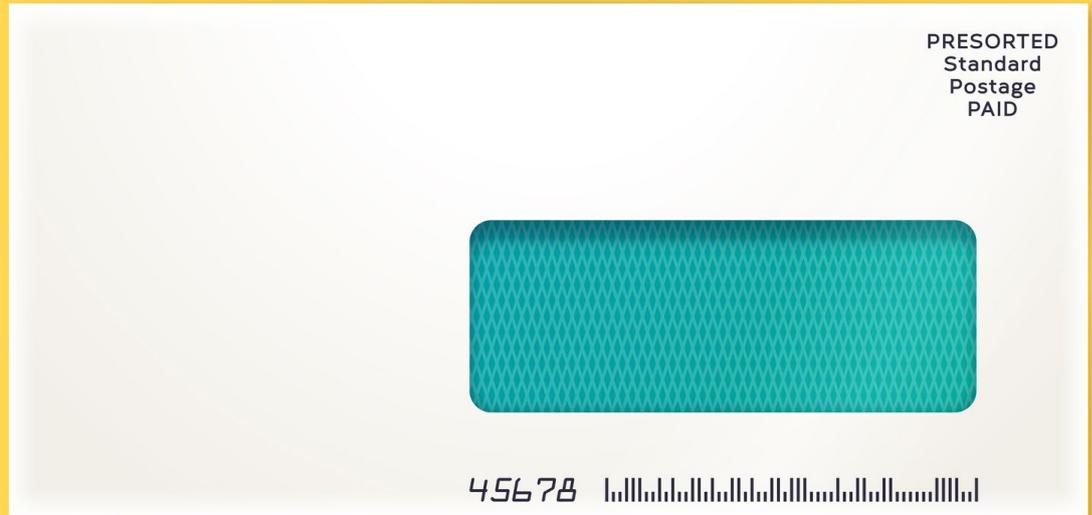
# September

<b>TITLE</b>	<b>The Financial Services Forum Mortgages Summit</b>
<b>DATE / TIME</b>	11:00 29 Sept – 15:00 30 Sept
<b>EVENT TYPE</b>	Residential summit- The Vineyard Hotel, Newbury
<b>GROUP</b>	Mortgages
<b>MEMBERSHIP</b>	<b>E</b>
<b>SYNOPSIS</b>	<p>An invitation-only selection of mortgage industry figures will meet for a summit to discuss the fast-changing mortgage market.</p> <p>This year's event will focus in detail on how the various elements of the mortgage process have changed and adapted to new practices. Each part of the end-to-end mortgage journey will be addressed through Surveying, Lending, Advice, and Conveyancing, with expert speakers from each area sharing their perspectives.</p> <p>The agenda will be spread across 2 days, and we will ask, what has Covid done for us? The past 18 months have driven huge change across the industry, but to what effect? We will take a deep dive into what we have learned, what we will keep and what will be ditched, as we emerge from lockdown and adjust to the new paradigm.</p>
<b>SPONSOR</b>	    
<b>REG LINK</b>	By invitation only



<b>TITLE</b>	<b>Translating Purpose into a “Blueprint” for Positive Action</b>
<b>DATE / TIME</b>	5 Oct – 09:00-10:00
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	Corporate Communications
<b>MEMBERSHIP</b>	<b>E A P</b>
<b>SYNOPSIS</b>	A topical event on corporate communications, looking at the role of purpose in 2021. In this session, an expert panel will look at how financial services organisations can translate their purpose into a “blueprint” for positive action.
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/translating-purpose-into-a-blueprint-for-positive-action/">https://thefsforum.co.uk/events/translating-purpose-into-a-blueprint-for-positive-action/</a>

<b>TITLE</b>	<b>The Financial Services Forum Executive Summit</b>
<b>DATE / TIME</b>	10:00 11 Oct – 15:00 12 Oct
<b>VENUE</b>	Residential Summit- Ellenborough Park, The Cotswolds
<b>GROUP</b>	General
<b>MEMBERSHIP</b>	<b>E</b>
<b>SYNOPSIS</b>	October marks the return of the Forum’s inaugural invitation-only Executive Summit. This year’s programme covers strategy, crisis communications, diversity and more, and poses an opportunity for the most senior FS marketing leaders to meet with their peers, share their learnings and connect.  <i>Please check the website for speaker and agenda updates.</i>
<b>SPONSORS</b>	  
<b>REG LINK</b>	By invitation only



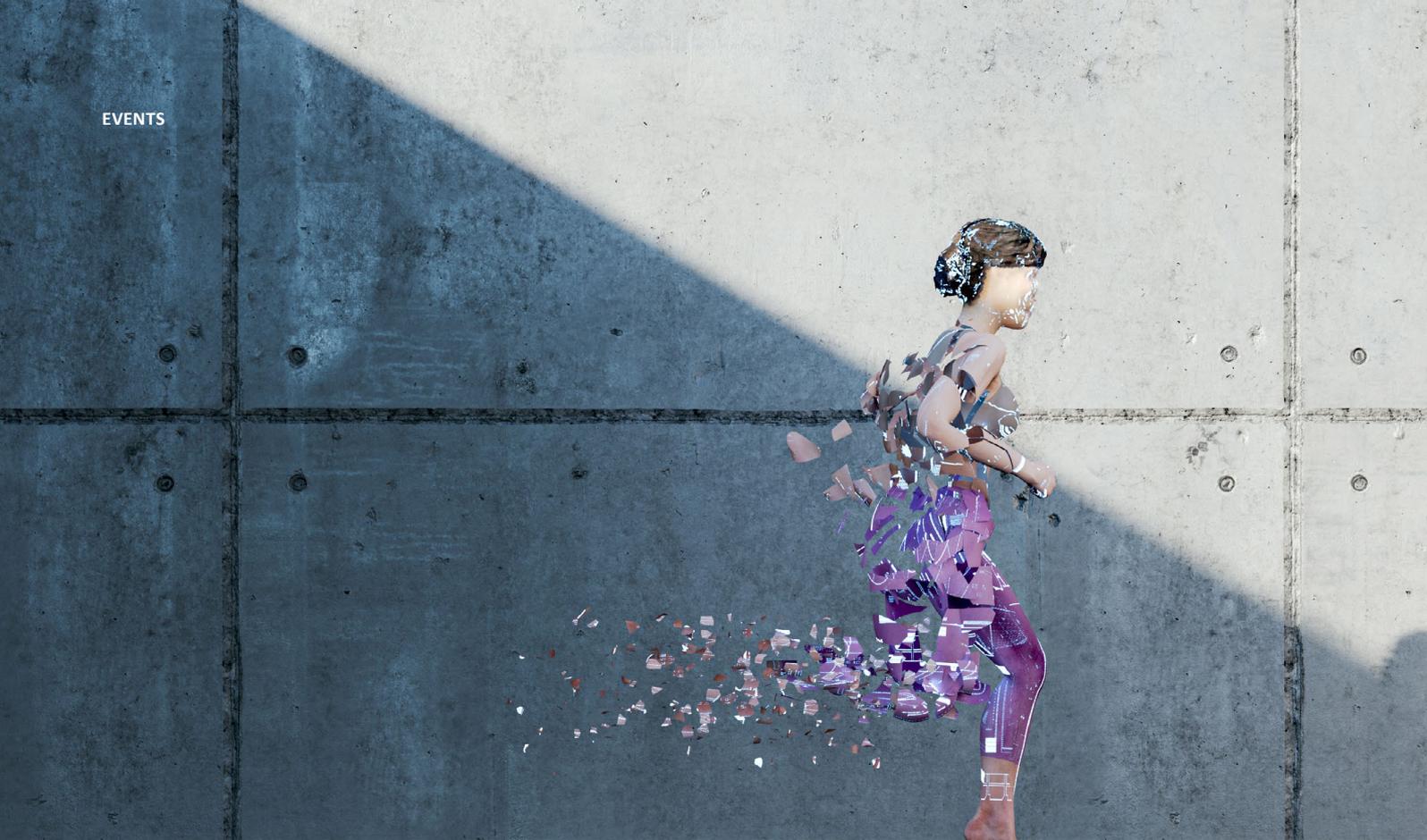
# October

<b>TITLE</b>	<b>Print Repurposed: What it was Then, and What it can be Now...</b>
<b>DATE / TIME</b>	19 Oct – 09:00-10:00
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	General
<b>MEMBERSHIP</b>	<b>E A P</b>
<b>SYNOPSIS</b>	<p>With such a focus on digital, is print and direct mail a relevant part of your marketing toolkit?</p> <p>A recent study found there has been a 97% engagement with direct mail over the last year. It seems digital may be far from the whole picture, and more direct methods of marketing, such as print, quietly attract high levels of engagement.</p> <p>However, with consistent pressure on marketing teams to operate best practice for their increasing ESG commitments and provide evidence of a budget well spent, where can they find the value of investing in print and including this in their marketing spend?</p> <p>In this session we will consider the role of print and direct mail, showing how it can be integrated into your digital toolset, how it can help unlock dialogue in Diversity and Inclusivity, and how it supports marketing to deliver that “relationship” experience to your customers.</p>
<b>SPONSOR</b>	
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/print-repurposed-what-it-was-then-and-what-it-is-now/">https://thefsforum.co.uk/events/print-repurposed-what-it-was-then-and-what-it-is-now/</a>



# October

<b>TITLE</b>	<b>Asset Management Marketing Focus</b>
<b>DATE / TIME</b>	21 Oct – 09:00-12:00
<b>EVENT TYPE</b>	Hybrid half-day conference – Fidelity International, 4 Cannon Street, EC4M 5AB
<b>GROUP</b>	Asset Management
<b>MEMBERSHIP</b>	<b>E A</b>
<b>SYNOPSIS</b>	<p>As we emerge from a prolonged period of restrictions and isolation, and as we move to a hybrid way of working, marketing and living, changes and challenges within Financial Services marketing have been brought into sharp focus.</p> <p>This half-day conference focusing on asset management marketing looks to explore the issues the industry currently faces and understand how marketeers can respond to these.</p> <p>Whilst all Forum members are welcome for the entirety of the event, the former half of the event takes a slightly more junior focus, whereas the latter might appeal to more senior marketeers.</p> <p>We will cover the basics of asset management marketing, how marketeers should respond to regulation – specifically the incoming ESMA rules, retaining talented asset management marketeers, and considering the role of asset management marketing in achieving sustainable targets.</p> <p>Please join us for an exciting return to hybrid events, the opportunity to make new connections with your peers, share knowledge and learn from the best in the industry.</p> <p><b>Speakers</b>  <b>Scott Stevens</b>, Establishment Commercial Director, St James’s Place Wealth Management  <b>Jacqui Haskins</b>, Head of Marketing &amp; Brand, Federated Hermes</p> <p><i>Please check the website for more speakers and agenda updates</i></p>
<b>SPONSOR</b>	<p>publicis sapien</p>
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/asset-management-focus/">https://thefsforum.co.uk/events/asset-management-focus/</a>



# November

<b>TITLE</b>	<b>The Tech-Driven Customer Journey</b>
<b>DATE / TIME</b>	4 Nov – 09:00-12:00
<b>EVENT TYPE</b>	Hybrid half-day conference- Location TBC
<b>GROUP</b>	General
<b>MEMBERSHIP</b>	<b>E A P</b>
<b>SYNOPSIS</b>	<p>Financial services marketers face an industry increasingly focused on customer experience. Creating great customer experiences is the new battleground for differentiation.</p> <p>What can FS learn from other industries and how could CX transform the sector as we know it?</p> <p>This hybrid half-day conference will cover martech, CX and the ways marketers can harness tech to tackle challenges in an increasingly digital market. Sessions will cover hyperpersonalisation, AI, trust and data optimisation, ABM and more.</p> <p>Our expert speakers will challenge your thinking around the customer journey, and bring you up to date on CX developments and how should transform your approach.</p> <p><i>Please check the website for more speakers and agenda updates</i></p>
<b>SPONSOR</b>	
<b>REG LINK</b>	<a href="https://theforum.co.uk/events/the-tech-driven-customer-journey/">https://theforum.co.uk/events/the-tech-driven-customer-journey/</a>

# November

<b>TITLE</b>	<b>What can Data do to Build Brands?</b>
<b>DATE / TIME</b>	11 Nov – 09:00-10:00
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	Brand Strategy
<b>MEMBERSHIP</b>	<b>E A P</b>
<b>SYNOPSIS</b>	<p>For years, brands were the most valuable marketing assets: now data has taken the lead. But can these two giant sources of value work together to mutual benefit?</p> <p>We know how much a data-driven approach can do for business performance- but at a brand level, does it reduce distinctiveness and make everything look, feel and sound the same?</p> <p>In short, have the number-crunchers pushed the creatives too far into the sidelines? Representatives of both sides argue it out in this session.</p> <p><b>Speakers:</b> Justin Deaville, Managing Director, Receptional <i>Additional speakers to be confirmed</i></p>
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/what-can-data-do-to-build-brands/">https://thefsforum.co.uk/events/what-can-data-do-to-build-brands/</a>

<b>TITLE</b>	<b>Is Business Banking the New Battleground?</b>
<b>DATE / TIME</b>	16 Nov – 09:00-10:00
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	Retail Banking
<b>MEMBERSHIP</b>	<b>E A</b>
<b>SYNOPSIS</b>	<p>Could business banking be the next battleground for retail banking?</p> <p>In the business banking space, fintechs and challengers increasingly pose a challenge to incumbent retail banks, excelling through better integrated digital offerings and customer service. The Big Four managed 85% of business accounts in 2020 (Mordor Intelligence), however challenger Starling Bank claim they will hold 18% of the SME market in five years time (insider.co.uk).</p> <p>With huge potential for growth, business banking could be the next battleground for the retail banking sector. In this webinar we will cover:</p> <ul style="list-style-type: none"> <li>• How to differentiate your business banking offering</li> <li>• What are challengers doing right and how can you compete?</li> <li>• How can you build a strong relationship with customers?</li> </ul>
<b>SPONSOR</b>	 <p><b>PHOEBUS</b> SEAMLESS SOFTWARE SOLUTIONS</p>
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/is-business-banking-the-new-battleground/">https://thefsforum.co.uk/events/is-business-banking-the-new-battleground/</a>

# November

<b>TITLE</b>	<b>Fintech: The Snakes and Ladders of Scaling up Across the Pond</b>
<b>DATE / TIME</b>	23 Nov – 09:00-10:00
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	Fintechs
<b>MEMBERSHIP</b>	<b>E A P</b>
<b>SYNOPSIS</b>	<p>What does it take to scale a fintech from the UK to the US, and from the US to the UK? That's the question we're going to be exploring in this session, where the snakes and ladders of scaling up will be revealed by the leading Fintech's striding across continents.</p> <p>With a live stream panel comprised of the hottest fintechs in the UK and Stateside, we'll be discussing the shift in thinking and actions required to move from start-up to scale-up that address some of the key challenges: role of brand and core narratives; the importance of Purpose versus profitability; vital partnerships; understanding the media landscape and the marketing pathway to successfully move through the stages from awareness to an IPO, Direct or Public Listing.</p> <p>We'll also look at how far the UK's Kalifa Review recommendations outlined in February – including amends to UK listing rules; tech visas to attract global talent and regulatory Fintech 'scalebox'- are helping retain the UK's global reputation as the fintech growth capital.</p> <p>Come hear from those who have already scaled and those on the launch pad. Appreciate their candour in marketing lessons learned; things they wish they had known in advance and what you need to put in place if you have scale up ambition.</p>
<b>SPONSOR</b>	
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/fintech-the-snakes-and-ladders-of-scaling-up-across-the-pond/">https://thefsforum.co.uk/events/fintech-the-snakes-and-ladders-of-scaling-up-across-the-pond/</a>
<b>TITLE</b>	<b>2021 Awards for Marketing Effectiveness</b>
<b>DATE / TIME</b>	23 Nov – 19:00–23:30
<b>EVENT TYPE</b>	Awards- Church House, Westminster
<b>GROUP</b>	General
<b>MEMBERSHIP</b>	<b>E A P</b>
<b>SYNOPSIS</b>	<p>2021 is a landmark year for the Awards for Marketing Effectiveness. We're celebrating 20 years of recognising the most outstanding marketing campaigns in financial services.</p> <p>The purpose of this flagship award programme is as relevant in 2021 as it was two decades ago:</p> <ul style="list-style-type: none"> <li>• to create a better understanding of the role and impact of marketing</li> <li>• to prove, beyond doubt, that marketing can be effective</li> <li>• to promote and reward marketing effectiveness</li> </ul> <p>Join us for our first live awards ceremony since November 2019, when we'll be making our 20th year one to remember.</p>
<b>SPONSOR</b>	  
<b>REG LINK</b>	For table sales, tickets and sponsorship please contact Ali Brancal at <a href="mailto:ab@thefsforum.co.uk">ab@thefsforum.co.uk</a>



# December



<b>TITLE</b>	<b>Behavioural Science in Life &amp; Pensions</b>
<b>DATE / TIME</b>	2 Dec – 09:00-12:00
<b>EVENT TYPE</b>	Hybrid half-day conference – Fidelity International, 4 Cannon Street, EC4M 5AB
<b>GROUP</b>	Life and Pensions
<b>MEMBERSHIP</b>	<b>E A</b>
<b>SYNOPSIS</b>	<p>A growing understanding of behavioural science is transforming financial services. New entrants harness the power of behavioural science, seen in the success of innovative offerings to customers.</p> <p>In this half-day conference we will look at how embracing behavioural science could impact the life and pensions industry. This is particularly pertinent with the FCA’s attention turned to the consumer journey and vulnerability.</p> <p>We will ask how BeSci could be used to improve customer journeys and treatment. How key is BeSci to developing better product design and ensure brands speak the right language with their customers?</p> <p>An event for anyone in life and pensions, or with an interest in behavioural science.</p> <p><i>Please check the website for speaker and agenda updates.</i></p>
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/behavioural-science-in-life-pensions/">https://thefsforum.co.uk/events/behavioural-science-in-life-pensions/</a>




# December

<b>TITLE</b>	<b>Top Tier Brands: What can Private Banking and Wealth Management Learn?</b>
<b>DATE / TIME</b>	7 Dec – 09:00–10:00
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	Private Banking and Wealth Management
<b>MEMBERSHIP</b>	<b>E A</b>
<b>SYNOPSIS</b>	<p>The CBI has predicted consumer spending will drive 70% of GDP growth in 2022. As we emerge from the pandemic, key competitors for the private banking and wealth management industry will be found out of sector, in sectors including luxury goods, travel, property.</p> <p>How do top tier brands create a relationship with their customers, and how do they develop their messaging around products? In this session we ask what private banking and wealth management can learn from the luxury goods sector as we emerge from the pandemic.</p> <p><b>Speakers</b>            Helena Warren, Managing Director, The Luxury Network            Justin Deaville, Managing Director, Receptional  <i>Additional speakers to be confirmed</i></p>
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/top-tier-brands-what-can-private-banking-and-wealth-management-learn/">https://thefsforum.co.uk/events/top-tier-brands-what-can-private-banking-and-wealth-management-learn/</a>
<b>TITLE</b>	<b>The London Mortgages Forum</b>
<b>DATE / TIME</b>	9 Dec – 09:00-10:00
<b>EVENT TYPE</b>	Webinar/Zoom
<b>GROUP</b>	Mortgages
<b>MEMBERSHIP</b>	<b>E A P</b>
<b>SYNOPSIS</b>	<p>A topical event looking at developments in the mortgages industry.</p> <p><i>Please check the website for speaker and agenda updates.</i></p>
<b>SPONSOR</b>	
<b>REG LINK</b>	<a href="https://thefsforum.co.uk/events/mortgages-focus/">https://thefsforum.co.uk/events/mortgages-focus/</a>

# Steering Group Committees

Meet our most senior members, setting the agenda for our special interest group events.

## Associate Member Steering Group Committee

**Sarah Salt**, Marketing Manager, Cannacord Genuity Wealth Management

**Emma Stacey**, Head of Marketing & Engagement, TSB

**Georgina Atkin Park**, Head of Communications, One Savings Bank

**Adam Lee**, Senior Marketing Manager, Ninety One

**Alana Walsh**, Senior Marketing Manager, Ninety One

## Insurance Steering Group Committee

**David Lundholm**, Director, Legal and General

**Sam Taylor**, Head of Commercial Marketing, Direct Line Group

**Sue Helmont**, Marketing Director, AIG Life

**Dharini Patel**, Head of Marketing, Travelers Europe

## Asset Management

**CHAIR: Piers Currie**, Partner, Warhorse Partners

**Jet Cooke**, Head of Marketing- End Investor, Fidelity International

**Courtney Waterman**, Head of Creative Marketing, Ninety One

**Scott Stevens**, Establishment Commercial Director, St. James's Place Wealth Management

**Nataline Terry**, Head of Marketing, EMEA, T Rowe Price

**Jacqui Haskins**, Head of Marketing & Brand, International, Hermes Investment

**Hazel Pitchers**, Director, Merakiting

**Bradley Gamage**, Director, Financial Services UK, Publicis Sapient

## Life and Pensions Steering Group Committee

**CHAIR: David Dunn**, Director, Making Sense of Retirement

**Alastair Black**, Head of Financial Planning Propositions, Standard Life

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

**Ken Hogg**, Chief Executive Officer, Chesnara

**Helen O'Donovan**, Head of DC Client Communications, Legal & General Investment Management

**Helen Morrisey**, Corporate PR Specialist – Long Term Savings and Retirement Spokesperson, Royal London

## Mortgages Steering Group Committee

**CHAIRMAN: Bharat Sagar**, Executive Chairman, AE3Media

**DEPUTY CHAIRMAN: Stephen Smith**, NED, Legal & General / Mortgage Advice Bureau

**Tracie Pearce**, Director of Retail Banking, HSBC UK

**Louisa Sedgwick**, Chair of IMLA and MD mortgages, Vida Homeloans

**Peter Brodnicki**, CEO, Mortgage Advice Bureau

**Esther Dijkstra**, Managing Director, Intermediaries, Lloyds Banking Group

**Roland McCormack**, Mortgage Distribution Director, TSB Bank

**Jon Round**, Group Financial Services Director, LSL Property Services

## Private Banking and Wealth Management Steering Group Committee

**CHAIR: John Elder**, Managing Partner, Family Office Advisers LLP

**Kirsten Burt**, Founder & Director, K Burt Consulting Ltd

**Sasha Dabiz**, Head of Marketing, Waverton Investment Management

**Hannah Holden**, Head of Marketing, EFG Harris Allday

**Jane Parry**, Head of Marketing and Communications, Canaccord Genuity

**Oliver Tregoning**, Head of Marketing, JM Finn

**Chris Dean**, Head of Marketing, Sanlam

## Retail Banking and Savings Steering Group Committee

**Brian Brown**, Head of Insight (Banking & GI), Defaqto

**Kevin Mountford**, CEO, Raisin

**Jill Waters**, Retail Director, NS&I

## Fintech Steering Group Committee

**Andrew Evans**, Founder & CEO, Smart Pension

**Anton Ruddenklau**, Head of Digital & Innovation, Financial Services & Partner, KPMG

## Brand Strategy

**Ben Rhodes**, Brand Director, Phoenix Group

**Sarah Shove**, Ex-Co-Head EMEA Marketing and Head of Global Brand Strategy, Columbia Threadneedle

**Eugenie Biddle**, Head of Brand, NS&I

**Raj Kumar**, Group Brand and Reputation Director, Aviva

## Direct and Digital Marketing Steering Group Committee

**CHAIR: Dominic Traynor**, Global Head of Digital Experience, BNY Mellon

**Bradley Gamage**, Director, Financial Services UK, Publicis Sapient

**Jonathan Mansley**, Sales & Marketing Director (was Digital Director), LV=

**Paul Thilo**, CEO, Union Services Europe

**Colin Bennett**, Head of Digital Distribution, Global, GAM

## Corporate Communications Steering Group Committee

**CHAIR: Tony Langham**, Chief Executive, Lansons

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