



IFW Annual Conference **2021**

Making Happiness Pay

This digital event is dedicated to the increasingly important topic of money and happiness

About this Event



Welcome to the second Initiative for Financial Wellbeing (IFW) Conference, entitled "Making Happiness Pay".

Taking place online over 2 days on 26th & 27th May 2021. There's a packed agenda to include a range of inspirational subjects from several speakers coupled with an increased number of opportunities for discussions, socialising and networking, all from the comfort of your own home or office..

If you can't make them all, don't worry. You'll be able to watch recordings of all sessions for 30 days after the event.

Our ambition is to create an open community of like-minded financial services professionals to meet and share ideas. At these digital events, you'll be able to do just that. You'll hear from experts on wellbeing and behaviours; discover why financial wellbeing gives great compliance, learn how to create happy working environments and much more. Delegate participation is very much welcome and we encourage you to pose questions to our speakers during the event.

Who is this conference for?

This is a conference open to all. We want the debate about money and happiness to involve everyone.

If you are a financial adviser, coach, planner, paraplanner, practice manager, fintech startup, product provider, marketing expert, charity or just an interested party – the IFW will help you to help your clients become happier as well as wealthier.

Who is speaking?



Ruby Wax, Comedian, Presenter & Author

Financially Frazzled: A discussion that will explore the links between financial wellbeing and mental wellness

Ruby Wax is a highly successful comedian, and presenter, who had her own show on the BBC for 25 years interviewing among others, Donald Trump, Imelda Marcos, Madonna and O.J. Simpson. She is author of four Sunday Times best-selling books, and has also for the last 25 years been performing her live one-woman shows globally, until recently directed by the late Alan Rickman. She has a Master's degree in Mindfulness Based Cognitive Therapy from Oxford University, and is a highly-acclaimed TedTalk Global speaker. She combines neuroscience, mindfulness and comedy in her recent tours and books, helping the world to find calm in this hectic 21st century. She was awarded an OBE for her services to mental health and is the founder of Frazzled Cafés, a place where people who are feeling frazzled can meet on a regular basis and share their personal stories in a safe, anonymous and non-judgmental environment. Where it's "It's OK to not be OK."

Ruby a Visiting Professor in the School of Mental Health Nursing at the University of Surrey as well as holding an Honorary Doctorate from the School of Psychology from The University of East London and University of Staffordshire. She has also been awarded a City Lit Lifetime Fellowship, and was recently appointed Chancellor of Southampton University.

In her latest book "And Now for the Good News" (Published September '20) Ruby examines how living in such a climate of fear we need to turn our attention to the possible. So Ruby's searched out the green shoots in business, technology, education, community, health and food that may be sprouting even now and, if we tend to them with care, may just bloom into a spectacular future.

Brought to you by : **Parmenion**



Dr. Elizabeth Dunn, Author of Happy Money: The Science of Happier Spending

An Interview and Happiness Makeover

Dr. Elizabeth Dunn is a professor in the Department of Psychology at the University of British Columbia. Dr. Dunn conducts experimental research on self-knowledge and happiness, with a current focus on how mobile technology can both support and undermine human well-being. She is the co-author of Happy Money: The Science of Happier Spending (Simon & Schuster) with Dr. Michael Norton. Her work has appeared in top journals, with three papers published in Science, and she has given talks at PopTech! and TED. She was selected as one of the "rising stars" in academia by the Chronicle of Higher Education in 2004 and was an honoree for the 2007 Mind Gym Academic Prize for pioneering work in positive psychology. In 2010, she received a New Investigator Award from the Canadian Institutes of Health Research, as well as UBC's Robert E. Knox Master Teacher Award. Her research has been featured in hundreds of media outlets around the world, including The New York Times, The Globe and Mail, The London Times, Maclean's, Time, and CNN. Dr. Dunn is also an avid surfer and skier.



Martha Lawton, Consultant, & Creator / Co-host of Squanderlust podcast.

Who wants to be normal?

Martha is a financial educator, and former financial adviser, who has been helping people understand and use money better for over 15 years. She has facilitated hundreds of workshops on day-to-day money management as well as running awareness raising campaigns and other financial wellbeing projects. Her work has given her a deep insight into people's emotional and psychological responses to money, which she discusses on her podcast Squanderlust.



Dennis Harhalakis Cambridge Money Coaching

Understanding our Money Behaviour

Dennis Harhalakis is a Certified Money Coach and founder of Cambridge Money Coaching. He works with individuals, couples and families to help them improve their relationship with money, and develop frameworks for positive communication around money. He also works with financial services firms that want to become more connected with clients, as well as running workshops to support financial wellbeing for employees of all organisations. Prior to becoming a money coach, Dennis spent 30 years in Wealth Management, setting up and running product platforms in the UK, US and Asia. He has worked with clients from all areas of the world, and is now based in Cambridge.



Phil Bray The Yardstick Agency

Marketing Financial Wellbeing to people who don't know what it is, or that they need it!

Phil has worked in financial services for over 20 years. He started at the coal face as a financial adviser before moving into marketing. He was head of marketing at a financial planning practice and network before setting up The Yardstick Agency in 2017. Phil had three aims when setting up The Yardstick Agency; to help more consumers connect with financial advisers and planners, to help advisers and planners market themselves more effectively and to provide jobs in Nottingham. The Yardstick Agency is now the highest-rated agency specialising in financial services and has a team of 29 people providing marketing strategy, websites, branding and design services, blogs, newsletters and inbound marketing to its clients.



Chris Budd, Founder & Chairman, IFW

Financial Wellbeing in Practice: How to pass the IFW Audit

Chris founded financial planning company Ovation Finance Ltd in 2000. He sold a majority of Ovation to an Employee Ownership Trust in March 2018. He is the author of four books, The Financial Wellbeing Book about money and happiness, and The Eternal Business, and two novels. His consultancy, The Eternal Business, helps business owners work out if selling to an Employee Ownership Trust might be their own succession plan. Chris writes The Financial Wellbeing Podcast. Chris lives in Somerset with his family and too many guitars.



Vanessa King, Action for Happiness

Unpacking Happiness

Vanessa is a leading expert in the practical application of positive psychology and the science of wellbeing, consultant and author. She is a Board member and Head of Psychology and Workplaces at the charity and social movement, Action for Happiness. She has a Masters degree in Applied Positive Psychology (MAPP) from the University of Pennsylvania studying with Martin Seligman and many leaders of the field and trained as a facilitator on its Master Resilience Training programme for the US Army.

She is the architect of Action for Happiness' evidence-based framework, '10 Keys for Happier

Living', which has engaged and inspired people to take action around the world – in workplaces, education, design and healthcare and as the basis for social prescribing.

Early in her career Vanessa qualified as chartered accountant (ACA) with Arthur Andersen and PWC and working in investment banking, before becoming a business consultant.



Andrew Manson, Chief Marketing Officer, Aegon

Financial wellbeing, is it more about mindset than money?

Andy is responsible for the development and marketing of propositions across workplace, retail and protection channels. Andy has over 25 years of experience in the industry across a range of marketing, operations and distribution roles. He joined Aegon from KPMG in 2016 where he was a management consultant working with insurers, advisers and asset managers to drive strategic change. Prior to this, Andy held a number of senior roles at Standard Life.

Agenda

Time	Day 1 26th May	Time	Day 2 27th May (please note minor time changes)
Morning			
08:30–09:00		08:00–9:00	Coffee and croissants.
09:00–09:30	Tom Morris Welcome & Introduction.	09:00–09:30	Chris Budd Welcome & Introduction.
09:30–10:15	Andrew Manson – Aegon Financial Wellbeing – is it more about mindset than money?	09:30–10:15	Phil Bray Marketing Financial Wellbeing to people who don't know what it is, or that they need it!
10:15–10:45	Round Table with Liz Zeidler Financial Wellbeing Tool	10:15–10:45	Round Table with Phil Bray
10:45–11:15	Break	10:45–11:15	Break
11:15–12:00	Chris Budd Audit value and evidence of Financial Wellbeing in Practice	11:15–12:00	Martha Lawton A 'normal' individual – How can advisers and coaches have productive conversations with clients about their ideas of what's 'normal', so their financial lives reflect the right balance of individuality and social belonging
12:00–12:30	Round Table with Kim Bendall Paraplanning for wellbeing	12:00–12:30	Round Table with Helena Wardle Advisor motivations
Afternoon			
13:30–14:15	Dennis Harhalakis Understanding our Money Behaviour – how insights from Money Coaching can help us to support clients and improve [financial] wellbeing'.	13:30–14:15	Vanessa King Unpacking Happiness, Action for Happiness
14:15–14:45	Round Table with Lorraine McFall	14:15–15:00	Paraplanners fireside chat with Benjamin Fabi & Rebecca Tuck
14:45–15:15	Break	15:00–15:15	Break
15:15–16:00	Ruby Wax Financially Frazzled: A discussion that will explore the links between financial wellbeing and mental wellness	15:15–16:00	Round Table with Russell Facer & Michelle Hoskin Financial Abuse; recognising the signs of vulnerability
16:00–16:30	Round Table with Julie Lord Attracting millennials and referrals with Gretchen Betts & Amira Norris	16:00–16:15	Break
16:30–16:45	Julie Lord Wrap up and what's on tomorrow	16:15–17:00	Dr Elizabeth Dunn Happy Money: The Science of Happier Spending (An interview)
19:00–20:30	Social Event	17:00–17:15	Chris Budd Summarising the event and goodbye



How much does it cost?

IFW Members

Regular tickets: £140+VAT

Non-members

Regular tickets: £180+VAT

If you already have your ticket please pass this booking link to people you know who would benefit from attending:

Book tickets - <https://initiativeforfinancialwellbeing.org.uk/ifw-annual-conference-2021/>



Parmenion



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