



“Invest in Wellbeing” Annual Conference – CPD Learning outcomes

Our annual conference on 25th May 2022 is CPD accredited meaning you can put this event towards your annual CPD. Here are the learning outcomes per keynote so you can see exactly what you will be learning and taking away!



Dawn Turner – ‘Financial planning: New World/New You’

- *How the environment, social and governance matters are changing how people think about investments
- *What is meant by a sustainable and responsible approach to people’s money
- *What are the risks and opportunities to consider when looking at beyond the mainstream products
- *How mainstream products are changing due to demand to have performance and beliefs combined
- *How people’s wellbeing can be impacted for better or worse by their approach to finance



Alison Gray, Wellthy – The Wellness Link – Incorporating Wellbeing into your Service Approach

- *Understand 3 business implications of research which shows a strong link between professional financial support and overall client wellbeing
- *Gain insights into gender differences related to wellbeing and financial advice.
- *Learn strategies to increase the focus on wellbeing in individual client interactions



Tom Mathar – From “Performance Maximiser” to “Wellbeing Maximiser”

- *Understand why “classic alpha” is an obsolete value proposition
- *Learn about Aegon’s money-mindset-model – their Financial Wellbeing approach
- *Find out why pursuing a Financial Wellbeing agenda is good business
- *Learn how to sell Financial Wellbeing



Nick Elston – “A Ride Across The Badlands”

- *Clearly define what Mental Health is & isn’t.
- *Have better conversations around Mental Health.
- *Build a ‘playbook’ to boost resilience, harness anxiety & build confidence.
- *Develop a strategy to ‘actively signpost’ people who are struggling.
- *Learn tools on how to ‘check in’ on ourselves & others to aid positive performance.



Simonne Gnessen – “Horns and Halos”

- *The importance of being a neutral thinking partner to help clients unlock their dreams and overcome their obstacles.
- *How language can be used to step into your clients’ map of the world and reframe their thinking.
- *The power of coaching the person, rather than the topic, for a transformational client experience.
- *Questions and techniques to facilitate deeper client insight and awareness about their life and money.



Alex Whitson - “The commercial benefits of building deeper client relationships (fuelled by insight from 250k+ client reviews)”

*Understand why almost all clients say they would recommend but so few actually do.

*Learn the key adviser behaviours that drive true client advocacy, based on cross-industry analysis.

*Hear how to benchmark and deepen client relationships over time.