

INNOVATE

Powering advisory experiences

Agenda

9:00 am - 9:45am | **Kickstart your day: registration, breakfast and exhibitor showcase**

9:45am - 10:45am

Welcome and intelliflo strategic update

Stay informed with the latest updates and strategic insights from our CEO Nick Eatock. Discover where intelliflo is heading, the exciting developments shaping the future of financial advice, and what's possible when technology truly powers your business.

10:45am-11:15am

IO Next Gen

Akeel Ahmed & Nick Eatock (intelliflo)

IO Next Gen is coming. But what is it?
Find out live as we unveil the next generation of intelliflo office and what it means for your business.

11:15am - 11:45am | **Recharge station: refreshments, networking & exhibitor showcase**

	Industry insights	Operational efficiencies	innovate centre	Client centric
11:45am - 12:15pm	<p>'Hot Takes': How to delegate the prep and own the advice with Timothy James & Partners</p> <p>Alan Gurung (AdvisoryAI) Sarah Watts (Timothy James & Partners) Gavin Bell (intelliflo)</p> <p>'Hot Takes' 2.0, discusses how AI is reshaping pre meeting prep, annual reviews, and proactive client outreach in modern advice firms and which workflows unlock the biggest capacity and compliance gains for your business.</p>	<p>Aberdeen Wrap & IO integration</p> <p>Derek Smith (Aberdeen Adviser)</p> <p>Aberdeen Wrap discusses how its integration with intelliflo office streamlines adviser workflows and improves operational efficiency.</p> <p>This will highlight the practical benefits of connected platforms for a smoother end-to-end advice experience.</p>	<p>Innovate your client review prep</p> <p>Kate McManus (intelliflo) Corinne Ruddick (intelliflo)</p> <p>Your team is drowning in manual review prep. But what if it didn't have to be? Discover how to automate the entire process, from identifying who needs a review to booking the meeting and reclaim hours every week.</p> <p>See it in action!</p>	<p>Navigating market uncertainty: How illustrations support clearer client conversations</p> <p>Charlie Parker (Albemarle Street Partners)</p> <p>Exploring key data points and visuals that help people see how money supports their life goals. The session will demonstrate how illustrations and visual storytelling simplify complex financial ideas, enabling clients to understand concepts up to 600 times faster and creating powerful breakthrough moments linking finances with life aspirations.</p>
12:30pm - 1:00pm	<p>Built on data. Driven by intelligence.</p> <p>Thomas Hogg (Timeline)</p> <p>Thomas explores how combining intelliflo and Timeline helps advice firms replace manual workarounds with connected, data-driven workflows, delivering cleaner data, smarter automation and faster decisions to build firms that are more efficient and more capable.</p>	<p>Transforming transfers</p> <p>David Moffat (The Platforms Association & TeX) Nicky Sevel (Woven Advice)</p> <p>Transfers have always been a challenge. But things are shifting. Join the Platform Association and Woven Advice as they reveal the collaborative efforts fixing long-standing problems and dramatically speeding up switching.</p>	<p>Innovate your post meeting collateral and advice journey</p> <p>James Calvert-Jones (intelliflo) James Richards (intelliflo)</p> <p>Your meeting ends, but the real work begins. Hours spent writing summaries, creating tasks, generating documents. What if it all happened automatically? See how IQ and automated workflows eliminate the post-meeting grind and keep your advice journey seamless.</p>	<p>Centralised professional client referrals, seamlessly connected to intelliflo</p> <p>Johnny Ridd, Founder, RQ Dr. Philip Courtenay, Founder, Humans and Money</p> <p>Seamlessly and centrally handle your professional connections as one system with help from intelliflo office.</p>

1:00pm - 2:00pm | **Lunch & networking**

Refuel and reconnect, enjoy lunch while connecting with peers and meeting our exhibitors

Quick-fire tech demos

Bite-sized tech innovations to fuel your thinking while you refuel yourself.
Hosted by Paul Thomson-Clark, Director of Solutions (intelliflo)

Joseph Williams (Zerokey) 1:10pm

Steven Bottomley & Ed Waite (Flagstone) 1:35pm

2:00pm - 2:30pm

Future-ready advice firms: A fireside chat with intelliflo leadership

Johann Koch, Natalie Beer, Roxanne Corrieri, Rich Wake (intelliflo)

Our leadership team pulls back the curtain on the future of advice firms. How does technology power adviser success? What do regulatory and operational resilience demands really mean? How is intelliflo positioned to support you through change?

2:45pm - 3:15pm

From hype to impact: What actually changed advice firms in the last 24 months

Joe Harris (Alpha FMC)
Sam Shaw (Freelance journalist)
Amira Norris (Altus Consulting - Accenture)

Industry experts discuss cutting through AI and platform hype to examine what advisers are genuinely using and what has delivered measurable outcomes.

The value of 'Flo'

Steven Hoare (intelliflo)

You've heard the hype. But what's Flo really delivering? See real examples from advisers actually using it, the concrete value it's creating today, and the game-changing capabilities coming next, automation that really works.

Innovate your cashflow

Aishling Costello (intelliflo)

Spreadsheets. Manual stress-testing. Hours building bespoke models.

What if it was all automated? See how intelligent cashflow modelling, with firm-level assumptions and instant reporting, transforms client conversations and removes compliance headaches.

AI: Transforming client journeys & investment experiences

Ester Bizcarrondo (AWS)
Jesse Robinson (intelliflo)
Natalie Holt (The Lang Cat)

From onboarding to client investment decisions, how AI is impacting the client journey and the balance required between automation and human advice.

3:30pm - 4:00pm

Can't We All Just Get Along? D2C and Advice

Rich Mayor (The Lang Cat)

The Lang Cat's latest **State of the Advice Nation** and **State of the Platform Nation** research, looks at how the advised platforms, D2C, targeted support and full advice are evolving alongside one another, and what the evidence actually tells us about the implications for advice firms and platforms. The aim is very much to be data led, balanced and directly relevant to advice professionals.

Data done right: How one firm transformed their business

Tony Wright (intelliflo)
Leigh Smith (Fairey Associates)

Data is everywhere. But are you actually using it?

See how a leading adviser is leveraging intelliflo dashboards and reporting to drive real efficiency, address regulatory demands, and answer FCA and Consumer Duty questions with confidence.

Innovate your advice implementation

Wai Chan (intelliflo)
Dan Barrett (intelliflo)

See how integrated tooling eliminates platform switching, automates consent tracking, and streamlines implementation, turning your most error-prone process into your most reliable competitive advantage.

Client financial education & technology touchpoints: What actually works?

Poppy Achilles (Independent Consultant)
Chirine Harb (Capital Partners)
Gillian Davies (Citywide Financial Partners)

Financial education content is supposed to help. But does it? A candid panel on what really moves the needle with clients, and which digital touchpoints advisers should actually invest in.

4:00pm - 4:30pm | **Afternoon energiser: refreshments, networking & exhibitor showcase**

4:30pm - 5:15pm

Leading people through technological change

Allister Frost (Former Microsoft leader & tech change expert)

In a world of rapid transformation, the real competitive advantage is how you lead your people through it. Allister Frost brings hard-won insights from the frontlines of tech disruption.

5:15pm | **Join us for a drink: Let's toast to innovation, collaboration, and the exciting future of financial advice**