

Sheffield CII Life & Pensions Society

PFS-Member Conference 2026

Wednesday 21st October 2026 | 9.30am – 3.30pm

Crowne Plaza Royal Victoria Hotel, Sheffield

Insight on regulation, pensions, financial planning, investment strategy and the changing future of advice

MORNING PROGRAMME

9.30am	Welcome and Opening Remarks Event Chair An introduction to the conference and the key themes shaping the day.
9.35am	The Final Countdown: Pensions and IHT Gareth Davies Pensions Specialist Scottish Widows Exploring the evolving relationship between pensions and inheritance tax, with a focus on the practical implications for financial planning and client advice.
10.10am	Effective Financial Planning for Business Owners Simon Martin Technical Development Manager Aviva Examining key planning considerations for business owners, including succession, retirement and the alignment of personal and business wealth objectives.
10.45am	Refreshments and Networking
11.00am	Data-Driven Supervision in Action Patrick Cassidy and Colin Sneddon Lead Associates Financial Conduct Authority An interactive workshop exploring how data informs the FCA's supervisory approach, supports the identification of emerging risks and influences its engagement with firms.
11.50am	Address to PFS Members Carla Brown Chair and Immediate Past President Personal Finance Society Reflections on the priorities facing the financial planning profession and the continuing development of advice, professional standards and member engagement.
12.10pm	Lunch and Networking

AFTERNOON PROGRAMME

1.00pm	The Industrialisation of MPS: The Alpha is in the Advice Freddie Streeter Head of Multi-Asset Solutions Pacific Asset Management Considering how the growth of model portfolio services is changing investment delivery and where advisers can continue to add distinctive and meaningful value.
1.35pm	Macro Update and Bespoke Decumulation Strategies Robert Sears Chief Investment Officer Rathbones A review of the macroeconomic and investment environment, followed by an exploration of bespoke approaches to retirement income and portfolio decumulation.
2.10pm	Refreshments and Networking
2.25pm	Getting Your Business AI Ready Scott Walker and Angie Staunton Investment Advisers Vanguard Exploring how advisory businesses can prepare for the opportunities and challenges presented by artificial intelligence, including implementation, governance and client outcomes.
3.00pm	Introducing the Pensions Dashboard Jenny Wright Regional Partnership Manager Money and Pensions Service A concise introduction to the Pensions Dashboard and the key considerations for financial advisers and their clients.
3.25pm	Conference Summary and Closing Remarks Event Chair Key insights from the day, concluding reflections and closing thanks.
3.30pm	Conference Close



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