MORNINGSTAR®

Morningstar® Adviser Forum
7 March 2012, London
Agenda

Please join us for the London Adviser Forum on 7 March at the Morningstar Offices.
To book your place, please click here.

Reasons you should attend

- Attendance is free of charge and includes refreshments and lunch
- Collect 5 CPD points points and gap fill credits: IFP#217, 222, 224, 244 PFS I C11#97-98, 100 and 109
- Learn how new Morningstar Analyst Ratings can support you
- See how to utilise social media to grow your business
- Learn how to have an independent AND efficient investment process

09:15 **Registration and refreshments**

09:45 **Adviser Workstation Seminar**

With RDR approaching, we demonstrate how to add value to your service proposition, streamline your advice process and strengthen your audit trail using Adviser Workstation.

Anastasia Georgiou, Head of Adviser Workstation, Morningstar

10:15 **Morningstar's New Global Fund Report**

Dan Lefkovitz of Morningstar's European Fund Research Team will discuss the firm's new Analyst Ratings and research report. Dan will explain how the Analyst Rating and Report should best be used by advisers and what differentiates it from the competition. He will also explain the Analyst Rating's positioning vis-à-vis the Morningstar 'Star' Rating and the OBSR Rating.

Dan Lefkovitz, European Fund Research, Morningstar

10:45 **Refreshment break**

11:00 **Social Media: Time-Wasting Fad or the Holy Grail of Communication Tools for IFAs and Financial Planners in a Post-RDR World?**

- The truth about social media and IFAs – what works, what doesn't, what's allowed and mistakes to avoid
- Examples of best practice from IFAs who are already successfully using social media in their businesses
- How to leverage LinkedIn: 70% of IFAs have a LinkedIn account but most admit to not knowing how to use this valuable business resource
- Proven tips on how to use social media to attract new clients and new professional introducers

Philip Calvert, Social Media Consultant, IFA Life

11:45 **Understanding Pension's Law**

Understand the relevant aspects of pension's law and regulation to pensions planning, focusing on pensions, divorce, bankruptcy law and pension assets.

Paul Clark, Pensions Consultant, Technical Connections

12:30 **Networking lunch followed by Adviser Workstation client training sessions**