



## **PIMS UK 18-21 MAY 2011**



### **Opening Address: The Upside of Turbulence**

As volatility dethrones incumbent leaders, it also creates untold possibilities to create economic value. Turbulence has an upside, and managers who know how to seize the opportunities arising out of seething markets will become tomorrow's champions. Based on a decade of research, historical case studies, and intensive work with established enterprises and start-ups, Professor Sull will draw lessons from companies that have consistently spotted and exploited opportunities that rivals have missed, lays out the fundamental logic of opportunity, and provides a series of practical steps to translate insight into action.

**Dr Donald Sull, Professor of Management Practice in Strategic and International Management, and Faculty Director, Executive Education, London Business School**



### **Keynote Address: Many Voices – One Sound**

Christian Gansch is a highly respected conductor and a renowned management consultant. In his presentations he compares communication, motivation and leadership in organizations with that of an orchestra. A brilliant communicator Gansch inspires audiences with his insightful, innovative and unconventional addresses.

In his address Many Voices-One Sound Gansch will explore how people can maintain their individuality and work together to create "one sound" and achieve the corporate goal.

Interwoven into his speech will be lessons learned from his experiences as a conductor. These examples will highlight areas such as why it is important for people to listen to, and co-operate with each other in order to know when it is their time to lead or follow.

He will show how getting the communication, motivation and leadership balance right can create an environment in which innovation and excellence can flourish, whether within business or music.

**Christian Gansch, Renowned Conductor & Management Consultant**



### **After Dinner Speaker – Friday Evening**

Former England cricketer, now television personality and after dinner speaker Phil Tufnell, is affectionately known throughout the cricketing world as 'The Cat'. Phil has entertained many television and sporting crowds over the years. During recent times, Phil has been able to combine his cricketing expertise with his 'mischievous' and 'laddish' reputation with a position as a much loved television and radio presenter and participant. He regularly enjoys the banter referring to his alleged misdemeanours.

Tufnell is a team captain on the BBC panel show A Question of Sport. He makes regular appearances as a reporter on BBCs The One Show. Tufnell appeared in one of the teams on BBCs Sport Relief Does The Apprentice. Through the huge following from 'I'm a Celebrity...Get Me Out of Here', when over 13 million people watched him Phil crowned as King of the Jungle, his popularity is undoubted.

**Phil Tufnell**

## **CONFERENCE SESSIONS:**

### **Industry Seminars & Workshops**

#### **How to maximise your prospects of being an RDR winner, not a casualty, and doing so compliantly**

Roderic Rennison will address the main issues that intermediaries will need if they are to successfully transition their practices to becoming fully RDR ready in the lead-up to 2013. He will also outline the key success factors if they are to maximize their chances of running profitable, stable and compliant businesses.

Specifically, he will:

- Highlight the main pitfalls and how to avoid them;
- Identify unresolved issues to track and how they might be addressed;
- Discuss the relative merits of different adviser charging structures and highlight the actions that need to be taken; and,
- Provide an action plan in the countdown to 1st January 2013

**Roderic Rennison, Director, The Ideas Lab Ltd**



### **How to create a trust with your client in three minutes or less: the art of acknowledgement**

It's no secret that clients find it difficult to visit their financial advisers. Some people compare this experience with going in for a dental appointment. Given this situation, how can you instil trust and comfort as quickly as possible? One method is to learn the art of acknowledgement. When you acknowledge someone, you are pointing to his or her strengths and capabilities in a clear and empowering manner. As a result, stress levels lower and the client becomes more receptive to seeing you as a trusted adviser.

- See the basic principles behind acknowledging others.
- Learn to show your clients that you recognize the courage it takes to come for financial advice
- Discover how to demonstrate, in a clear and convincing manner, that you are there to support that client to be financially successful.

**Dr. Maria Nemeth, Speaker, Psychologist, Coach & Author**

### **Using technology to power your business – not just today but tomorrow...**

Good technology should be invisible. This session offers a practitioners perspective on the way that systems and processes can be integrated throughout an advice business - showing how a firm can better control and implement process whilst avoiding the cul de sacs that can destroy efficiency and increase risk.

Taking into account current regulatory thinking and challenges in respect of platform adoption, this workshop will offer insight into the way that planning firms can measure executional excellence and distinguish between information and value - powering their proposition, both today and into the future.

**John Porteous CFP FPFS FCSI, Chartered and Certified Financial Planner**

### **European regulatory developments and the impact on IFAs**

This session will look at the following areas:

- The intermediary landscape in Europe: developments in regulatory architecture in the EU.
  - How we got to where we are.
- Powers and objectives of ESAs.
  - Where the European agenda is going and how it works – single rulebook.
- Impact on UK regulatory regime.
  - Limitation of FSA powers - a matrix landscape.
- Impact on IFAs.
  - Specific considerations and issues.

**Chairman: Justin Urquhart Stewart, Marketing Director & Co-Founder, Seven Investment Management**

**Speaker: Stephen Gay, Director General, AIFA**



## **Panel Sessions**

### **Will your in-house or outsourced investment process stand up to scrutiny by a court or the FSA?**

A panel session debating the following topics:

- How do firms carry out and document their investment research? (with ref. to funds/stocks or their chosen discretionary fund manager.)
- Benchmarking; how useful and meaningful is it and how do firms actually do it?
- Client reporting; how do firms manage to successfully communicate a high level of detail while providing a format that clients actually understand?
- Asset allocation tools, useful or is a manual approach better?
- Automatic rebalancing or manual approach?

**Chairman: Justin Urquhart Stewart, Marketing Director & Co-Founder, Seven Investment Management**

**Panel Members: Saran Allott-Davey, Managing Director, Heron House Financial Management, Paul Willans, Director and Chief Investment Officer, A J Buckley Asset Management Limited**

### **What is there in store for your profession – a bright future?**

A panel debate looking at the following areas:

- Is it possible to have one single professional body and/or overarching set of professional standards?
- How are the professional bodies differentiating themselves from each other?
- What is the future of professional standards in the industry? Can advisers expect higher levels?
- What is the role of the new accrediting bodies?
- Will having a Statement of Professional Standing help restore consumer confidence and lead to more people wanting to join the profession?
- What choices and improvements can advisers expect in the short-long term?

**Chairman: John Porteous CFP FPFS FCSI, Chartered and Certified Financial Planner**  
**Panel Members: Fay Goddard, Chief Executive, PFS, Nick Cann, Chief Executive, IFP**  
**Joel Adams, Joint CEO, LIFT-Financial, Alan Easter, Strategy, Product & Commercial Development Director, Honister Capital**



### **2012 and the changing pensions landscape**

Every employer needs to think about 2012 and may seek advice on the options available. For intermediary businesses this could present a tremendous opportunity to expand activity and provide additional support to their corporate clients.

In this session there will be a 15 minute presentation on the reforms, impacts, the role of NEST which will be delivered by Paul Gilbody, Director of Market Engagement at NEST.

The presentation will be followed by an interactive panel session who will discuss the area of advising in an automatic enrolment world and will focus on:

- The RDR.
- What are the opportunities?
- Where does NEST fit in.

**Chairman: Justin Urquhart Stewart, Marketing Director & Co-Founder, Seven Investment Management**

**Speaker: Paul Gilbody, Director of Market Engagement, National Employment Savings Trust (NEST)**

**Panellists: Dick Strattan, Partner, Mercer and Richard Brown, Head of Business Development, Bestinvest**

### **Discussion Groups**

#### **Advising female clients - are you getting it right?**

Advising female clients is an area undeveloped, and perhaps reluctantly explored, by many IFAs. Yet, female clients offer an often under-valued revenue stream. Whilst the provision of any financial planning service may require a 'gentle touch', experience shows that women feel more reluctant to seek advice in areas where they lack confidence. An important part of overcoming this is to empower your female clients, enabling them to make sound financial judgements by helping them to make an educated choice.

This discussion group will focus on the following areas which will help delegates learn more about how to successfully advise female clients:

- The psychology of women – is there reluctance to seek advice? And if so why?
- Designing a bespoke service – is it really necessary and what could it include?
- Establishing and maintaining the client relationship
- Is there a sound business argument for focusing your services on female clients?

**Louise Walker, Managing Director, KMG Independent**



### **Best practice ideas in financial planning**

A discussion focusing on how best practice can enhance client experience, improve consistency of delivery and improve business profitability. The session will explore the following areas:

- best practice ideas for financial planning firms – ideas, views and first hand experience.
- the role of technology in achieving best practice and good customer service.
- profitability drivers for advisers and their effects on best practice.

**Julie Lord, Head of Strategic Development, Bluefin**

### **Financial advice for businesses**

This discussion group, chaired by Tim Hines, will give delegates the chance to discuss and share information on the area of providing financial advice for businesses.

The discussion will focus on the following areas:

- National Employment Savings Trust (NEST) and auto enrolment
- RDR – implications for: fees, services and the advice market
- Worksite marketing – opportunities or not
- The evolution of group healthcare – cost and benefits

The session will be interactive and afford the 8-10 delegates in the room a real chance to debate the topic with their peers.

**Tim Hines, Managing Director, Beckett Financial Services**

### **Is the only thing worse than being talked about, not being talked about?**

This discussion group, moderated by David Morris, will give delegates the chance to debate the use of new media and social networking to promote your business. Whether you are a seasoned user or still relatively new to the game, come along to this session to share your views and hear what others in your industry think.

The discussion will focus on the following areas:

- Social media - is it necessary, is it really a big deal? Will it attract and keep more clients?
- Delegate experiences: how do you know what's hot and what's not, what will / will not deliver ROI?
- How do you take part in the revolution without being overwhelmed?
- Is social media the future for IFA/client relationships?

**David Morris, CEO, Premier Independent Investments (UK) Ltd**



### **Using adviser charging to enhance the value of your firm**

This session, chaired by Roderic Rennison, will provide delegates with the chance to discuss and share information on the area of using adviser charging to enhance the value of your firm.

Roderic will start the session by providing a 10 minute overview of the latest developments in the market before moving on to the discussion points below.

- The need to have a clear understanding of costs in order to charge the appropriate level of fees
- The impact of segmentation on client propositions and fee levels
- The need for improved MI and technology to be able to charge and collect fees efficiently
- The relative merits of different charging structures: (hourly, for the preparation of financial plans, funds under management and success related fees etc)
- How adviser charging can most effectively promoted to new and also existing clients and dealing with objections
- The importance of effective buy-in from advisers and staff not just clients for adviser charging to be implemented successfully

The session will be interactive and afford the 8-10 delegates in the room a real chance to debate the topic with their peers.

**Roderic Rennison, Director, The Ideas Lab Ltd**

### **Working with solicitors in a post Legal Services Act environment**

The 6th October 2011 ushers in a new era of professional advice in which the dividing lines between the legal, accounting and financial planning disciplines will be broken down and reconfigured. New business entities and relationships will emerge which are focused on identified client needs.

The existing solicitor model is under threat with the emergence of new entrants to the legal marketplace. Solicitors will need to reassess their proposition and professional financial planning firms are well placed to assist them.

This discussion group will focus on the following areas:

- How to identify the solicitors who are most likely to make good business partners
- How to persuade solicitors that you are more suitable for them than other IFAs
- How to assist solicitors to understand the relevance of financial planning to their legal work and their building of client relationships
- How to reassure solicitors those client referrals will not be a "one-way street"
- How to find out what you need to know about solicitors' business
- Considering the impact of new 'outcomes based regulation' for solicitors also effective in October this year - the significance of client information.

**David Seager, Development Director, SIFA**



### **The IFA dilemma: outsourcing of investment management in the new RDR world**

This interactive discussion group chaired by Henry Shires, Senior Investment Director at Rensburg Sheppards will look at the following points:

The Pros and Cons

- Active vs passive management:
- Discretionary investment management vs. multi-manager.
- Direct with DFM or via platform.

Charges and Remuneration:

- How important are TERs?
- Is cheaper always better?
- What further transparency is demanded by IFAs and clients?

**Henry Shires, Senior Investment Director, Rensburg Sheppards**

### **Ways to retain and attract new clients**

An interactive discussion group looking at the following areas:

- Client retention, are there any secrets to the service proposition which work better than others?
- Tackling the fees issue, experiences from those in the room.
- Attracting new clients, most effective methods – delegate experience.
- Retaining new clients: how do you ensure a cost effective and high enough level of service to keep them?
- How do you ensure you attract only clients relevant to your business model and what to do with those who are not?

**Michael Merrett, Principal, Independent Financial Advisory Centre**



## **Professional & Career Development**

### **How to effectively lead a group**

Whether you manage a work group, lead an organisation, or consult with corporate or special interest teams, there may be times when you wish you had a number of tools that could help guarantee the success of your endeavours. There are strategies that those who effectively lead groups have learned to employ. This hour presents some of these skills and strategies, taken from work done with thousands of people from diverse backgrounds over the past twenty-five years. In this hour you will:

- Learn about the phenomenon called "group mind" and how it affects problem-solving skills of group members.
- See the "Zig/Zag" process, a four step problem-solving model that will increase the efficiency with which groups tackle and resolve important issues.
- Learn about the "positive deviance" approach to bringing out the best in virtually every group you lead.
- Discover a definition of success that brings clarity and ease to the situation

**Dr. Maria Nemeth, Speaker, Psychologist, Coach & Author**

### **So you think you have a poor memory?**

Ever misplaced your keys, wallet (or even the car!) and blamed your memory for letting you down again? Have you instantly forgotten the name of a potentially important client seconds after meeting them? Well if you think your memory is on the blink and you are blaming your age then you need to understand why and how your powers of recall can be far better than they are right now. Your natural abilities of memory and recall will astound you once you know how to tap into them. In this entertaining, engaging and interactive session you will discover:

- The 10 things that deceive you into thinking you have a poor memory and what you can do about them
- How to supercharge your powers of recall to an astonishing level in less than 5 minutes.
- The simple secret to never having the embarrassment of forgetting someone's name EVER again.

**Michael Tipper, speaker, facilitator, presenter and writer**

**Influencer: the power to change anything**

We are surrounded by profound, pervasive, and persistent problems. At work, we try to change corporate culture, get staff to apply the learning, improve sales, reduce accidents, get people to behave differently, improve performance, but we fail. Despite our repeated attempts to do everything to change people's behaviours, few of us have more than one or two ideas about how to exert influence and achieve real change.

This workshop will share some powerful principles for changing behaviours – principles that anyone can apply to change almost anything. Delegates will learn how to get to the root cause of problems they are facing and the few key 'vital behaviours' that, if adopted or abandoned, will lead to the results they want. Once you've identified where to focus your energy, you use six powerful sources of influence – and develop strategies to motivate and enable people to behave in new ways, and combine this with personal, social, and structural forces to create a complete strategy for influencing behaviour change and make change 10 times more likely.

In this workshop you will:

- Identify personal examples of persistent problems that you want to solve.
- Appreciate why we do not influence others very successfully, and see and hear examples from some great influencers.
- Understand why people behave in the way they do – and how we can help people change.
- Learn about the 6 sources of influence that together create a complete and compelling strategy for influencing change.
- Apply the skills and principles to some real influence problems.

**Richard Pound, Business Development Director, Grahame Robb Associates Ltd**

**The reality of leveraging social media in the workplace**

Now that social media is well past the "fad" stage and had a chance to mature, it's time we took a look at its real applicability in the workplace. Join Euan Semple as he discusses tangible pros and cons about encouraging the use of social media in the workplace, and how best get the most out of them.

Discussion points will include:

- How can the use social networking help your current organisation, instead of just helping find our next one?
- Which applications are the most productive, and how can we use them?
- How do you create a culture where people are willing to share and to work together to improve your business?
- How much "open" is a good thing?
- Where is the line where employees' use of Social Networking go from productive to time-wasting?

**Euan Semple, Independent Adviser & Former Director of Knowledge Management, BBC**

**Brave new world**

As business leaders emerge from the aftermath of the 'great recession', they are discovering the world has changed. These may no longer be turbulent waters but they are certainly uncharted waters.

There is now a "new normal" and a new set of rules. We've never been here before.

Business leaders of today are explorers of new frontiers, metaphorically speaking. Like Captain James Cook before them, they have no accurate maps, just a compass pointing brave and bold leaders in the right direction. Like intrepid explorers business leaders need to embark on new quests that capture the imagination and energy of the people around them.

The surest way to fail in a world that has changed is to do the same things you did in the past, over and over again. Business models across the globe are being reinvented as digital technologies and emerging dynamic economies reshape the world we live, work and play in. The opportunities are huge, the risks are great.

**Dean Van Leeuwen, Co-Founder, Tomorrowtoday**

**Being the best - lessons from the front line**

The battlefield is a terrifying environment, where enemy action adds danger and complexity to the simplest of tasks; mortars land in dining areas, resupply convoys are ambushed, surgeons operate from tents. How do officers plan complex operations when they are themselves scared and exhausted, and what inspires young soldiers, in many cases products of the hoody generation, to risk their lives again and again in pursuit of higher objectives?

Do you have this level of loyalty in your own organisation? Would you like to? In this presentation former Gurkha officer and Sandhurst leadership instructor Neil Jurd explains how the army succeeds where others fear to tread, and drawing on his experience as Head of Logistics with British Sugar, explains how battlefield loyalty and efficiency can be applied in the workplace improving morale and increasing output.

**Neil Jurd, Former Squadron Commander, Queen's Own Gurkha Logistic Regiment**

**Mind the gap**

This award-winning presentation, repeatedly requested by CEOs and event planners around the world, is a multi-media, humour-filled exploration of the different generations: how value systems are developed and how these influence attitudes and behaviours. By understanding the impact of different generations, inside and outside your organisation, you can improve customer relationships, and the productivity and interactions of your teams. Understand what shaped and formed boomers, gen Xers and gen Y, and why younger and older people – staff, customers, family and friends – have such different expectations and approaches to life, leadership, work and relationships. Apply the insights immediately and change your company forever.

This presentation helps participants understand why people older and younger than themselves have different value systems, and how a generation gap influences attitudes and behaviours. It concludes with practical applications suitable for the audience – this includes how to attract, retain and engage employees, how to connect with valued customers and service clients, across the generations.

**Dean Van Leeuwen, Co-Founder, Tomorrowtoday**



## **Exhibitor Presentations**

### **Financial Planning Tools for the qualified adviser**

This session seeks to identify the DNA of a 21st Century Adviser and what innovative technology can do to facilitate; Technology is even viewed as the new commission by some industry sages. We will look at what a robust investment process needs to deliver, and how static factfind data can be utilised throughout the value chain.

Colin will seek to examine what successful advisers need to succeed in a post RDR environment. The session will include a brief demonstration of Wealth Optimiser, the new lifetime Cashflow planner from the host company.

#### **Content**

- Introduction
- Asset Transformation
- Lifetime Cashflow & Asset Growth Modelling - tools of the trade
- Summary & Q&A

**Colin Sloss, Head of Sales & Strategic Accounts, Avelo**

### **Selecting the right ETF**

There are several key criteria that need to be considered when selecting an ETF for your client. In this session iShares will look at each of those in turn to help you make the right choice for you and your client.

- Provider - How well do you know your provider?
- Exposure - What 's inside your ETF?
- Structure - What are the implications of structure?
- Performance - How do you compare ETF performance?
- Liquidity - Can you trade when you need to?
- Cost - What does it really cost?
- Tax - What are the tax implications?

**Pollyanna Rhodes, Vice President, iShares, BlackRock/iShares**

### **Becoming a Successful New Model Financial Planner**

Tom presents a case study on a 'new model' HNW financial planner - Astute Wealth Management. We know RDR is not just about taking exams, its a 'whole business' transformation, with many opportunities, and potential pitfalls. Tom will talk about how Astute answered questions including:

- 'What is my time worth?'
- 'How do I justify my charges if I don't manage all the money?'
- 'How can I keep my clients? And the control of my clients?'
- 'How do I grow a professional practice, and not be product sales reliant?'
- 'How do I avoid expensive technology cul de sacs?'

**Justin Urquhart Stewart, Marketing Director, Seven Investment Management and Andy McLaughlin, Managing Director, Astute Wealth Management**

**Business funding – can pensions help?**

This presentation will cover a variety of ways that pensions can be used to help with business funding. Methods discussed will include unlisted share purchase, purchase (and part purchase) of property, investment in intellectual property rights and loans to businesses, both via SSAS loan back and loans to third parties.

A number of scenarios and case studies will be presented, with real-life solutions on both individual and grouped bases.

**Lisa Webster, Senior Technical Consultant, Hornbuckle Mitchell Group**

**Your investment Process – de-risking your business**

As RDR fast approaches there is even greater pressure on the adviser to demonstrate to the regulator and client that they have a rigorous and repeatable investment process. Whilst this is crucial, it must not hinder the ultimate goal of sufficient risk adjusted returns for the end clients goals and ambitions. During this presentation we look to deliver a balanced view on Asset allocation tools, model portfolios, risk rated funds, Multi Managers and DFM's alike. We consider the time vs. value considerations of building portfolios. In addition we will re-enter the debate surrounding active vs. passive strategies and how modern portfolio planning challenges traditional lifestyle planning and some of the more risk-averse strategies.

As well as raising the pro's and con's of the various investment strategies, we aim to leave you with a number of useful tools, websites and surveys to assist you in your future advice.

**James Crossley, Strategic Alliances Director, Jupiter Unit Trust Managers**

**Octopus – Enhancing Business Value**

Every business owner, in every industry, wants to know how to build capital value in their business. Nowhere is this truer than in the advisory market, where valuations remain bizarrely depressed. We say bizarrely because it's the only industry we can think of where the firms controlling the customers (advisory businesses) aren't worth most of the money.

The good news is that all of the changes currently underway in financial services are creating some great opportunities for advisory businesses to build capital value. To succeed, we believe that IFA firms need to make a few, simple changes to their business model. And do so in a way whereby they retain control - control of the clients, of the assets and of the advisers they employ.

Octopus has spent the last two years listening and working with advisers to design a solution that meets their needs. And it shows - dozens of IFAs are signing up to the service each month.

**Hugi Clarke, Head of Third Party Relationships, Octopus Investments**



## **Investment Forums**

### **Group 1**

**WDB Assetmaster** - Is Multi-Asset the new multi-manager? How does multi-asset investing differ from traditional fund-of-funds? We will touch on the merits of combining various asset classes from ETF's to structured products and absolute return strategies, alongside long only equity managers. Benefits. How to compare, contrast and combine different asset classes thus delivering a more attractive return within the risk constraints taken and reducing equity market correlation and portfolio volatility.

How Multi-Asset funds can help advisers provide managed solutions for their clients in a post RDR world.

**Laurence Boyle, Investment Director, WDB Assetmaster**

**SC Davies** - Behavioural finance is often made reference to, yet remarkably few people really understand what it is. Fewer still apply it practically in their investment processes. During the market turmoil of the credit crunch, even the most ardent believers in traditional finance have questioned the worth of Modern Portfolio Theory at some point. Chief Investment Officer of S C Davies & Company and Behavioural Finance advocate Paul Denley sheds a light on this interesting topic and explores how by paying more attention to behavioural finance risk adjusted returns can be improved.

**Paul Denley, Chief Investment Officer, SC Davies & Co**

**Deutsche Bank** - ETPs [ETFs and ETCs] exist today pursuant to two decades of capital market functionality advances fused with technological innovation. Aside from marking the beginning of the asset management industry's ascent on stock exchanges, ETPs are the most prominent brainchild of this trading (r)evolution. Liquidity, increased transparency and cost effectiveness are just some of the benefits that ETPs have brought to the table, features that have transformed both the instrument as well as the asset allocation decision making process. What though is the optimal ETP implementation path for cross asset class portfolios?

**Christos Costandines, ETF Strategist, Deutsche Bank / db X-trackers**



## Group 2

**Seven Investment Management** - The constant in the world is change. Thanks to a combination of technology and scale, cost efficiencies that we didn't think possible a few years ago now are quite plausible. Given that the world seems set for a lower growth rate, with the likelihood of correspondingly lower investment returns, saving costs for clients will be critical, particularly in lower risk portfolios. 7IM has some more innovative ideas on how to give your client very good value for their money. And you can take advantage of them right now!

**Tom Sheridan, Chief Executive, Seven Investment Management**

**Absolute Fund Manager** - The idea is to provide an informal introduction/update to hedge funds and the various strategies we invest in through worked examples. We will explain the basic workings of equity long/short; event-driven and distressed strategies, in an easy-to-understand format. There will be plenty of time for questions.

**Andrew Wheeler, Partner, Absolute Fund Managers LLP**

**Martin Currie** - It's not just Brazil! Opportunities for investors in Latin America. Increasingly, it's the world's emerging economies that are driving global growth. By 2012, their share of global GDP should exceed that of the developed world for the first time. This is a historic development - one that creates both challenges and opportunities for investors. The emerging economies of Latin America offer investors spectacular growth opportunities. The region presents a rich and exciting mix of growing economies, natural resources, increasing consumption and positive demographics and - above all - great companies. Join Jeff Casson, manager of the Martin Currie Latin American Fund, to find out why we think every investor should have some exposure to Latin America. Jeff will discuss the key investment themes that make Latin America an excellent investment opportunity for 2011 and beyond. And no - it's not all about Brazil ...

**Jeff Casson, Product Manager, Latin America, Martin Currie Investment Management Ltd**

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