

The Future of Advice

A Panacea Adviser Thought Leadership Campaign



Hallmark of Innovation
Financial Innovation Awards
Finalist – 2016



The Future of Advice

Panacea genuinely believes that advisers need clarification on forthcoming issues that can potentially bring seismic change to the UK advisory sector.

The Future of Advice campaign aims to offer a comprehensive picture of the financial services industry, imminent changes to regulation and underlying factors leading to new trends that will likely disrupt the status quo over the next 18 months. This includes, but not limited to:

MiFID 2

Advisers need to get their business ready for MiFID 2 including:

- Tighter rules on complex products
- Target markets
- Client conversations
- Financial reporting and complaints
- Inducements and remuneration
- Investment governance and research

FCA Asset Management Market Study

This will include impacts of the removal of trail commission, the future of using intermediated investment platforms to win and retain customers and how the 'all in' fee will work.

GDPR

What advisers need to do to ensure compliance and how the regulation will affect various financial services products.

Pensions Dashboard

What it means and what advisers should expect and what they will need to plan for.

Robo Advice

How advisers may have to re-evaluate their proposition and upgrade their practices to prosper against competition in the future.

Campaign Summary

When?

- ✓ The campaign will run from 8th January 2018 until 20th April 2018.

What's included?

The campaign includes a number of different elements and you can take part in any or all if you choose:

- ✓ Future of Advice Guide
- ✓ Dedicated microsite
- ✓ 12 week promotional campaign
- ✓ Dedicated tools & checklists created on key subject matters
- ✓ Future of advice road shows in 6 locations around the UK
- ✓ Virtual event

What are our objectives?

- ✓ To educate and help advisers firstly understand the key issues and secondly provide a roadmap for them to follow.
- ✓ To provide advisers with high quality advice and ideas to shape the future of their advice process.
- ✓ Facilitate professional networking between advisers, peers and provider firms
- ✓ To position Panacea and its partners reputation's as trusted Thought Leaders

Why Panacea?

- ✓ As one of the largest Adviser engagement platforms in the UK, Panacea is ideally placed to provide this information and inform its community of the best way forward.

The Guide

Available for one year for download from the dedicated Future of Advice microsite.

The Future of Advice guide will provide a comprehensive overview by experts, top industry players and consultants on forthcoming regulatory developments within financial services, specifically those relating to financial advisers.

We are aiming to provide thought leaders with the opportunity to share insights, analysis and case studies on that reflect a number of key developments such as:

- ✓ MiFID 2
- ✓ FCA Asset Management Market Study (*inc removal of trail, evolution of charging models and platforms and the all-in fee*)
- ✓ GDPR
- ✓ Robo advice & the Pensions Dashboard
- ✓ Evolution of charging models and platforms
- ✓ The correct advice model for your business
- ✓ Selling your business

Companies that contribute to the guide will automatically receive contact details of individuals as they download it.

Guide structure

- ✓ Detailed introduction and summary from Glassagh consulting
- ✓ Valuable insights & thought leadership from guide sponsors, covering the latest trends and developments that will shape the advisory space
- ✓ Tools and tick lists to assist with the preparation of change
- ✓ Full page company profile, links, services, USPs and logo

The Microsite

In 2016 the Panacea website received 48,000 visits and 90,000 page views.

The microsite will be accessible via the main Panacea website plus it's own dedicated URL for 12 months.

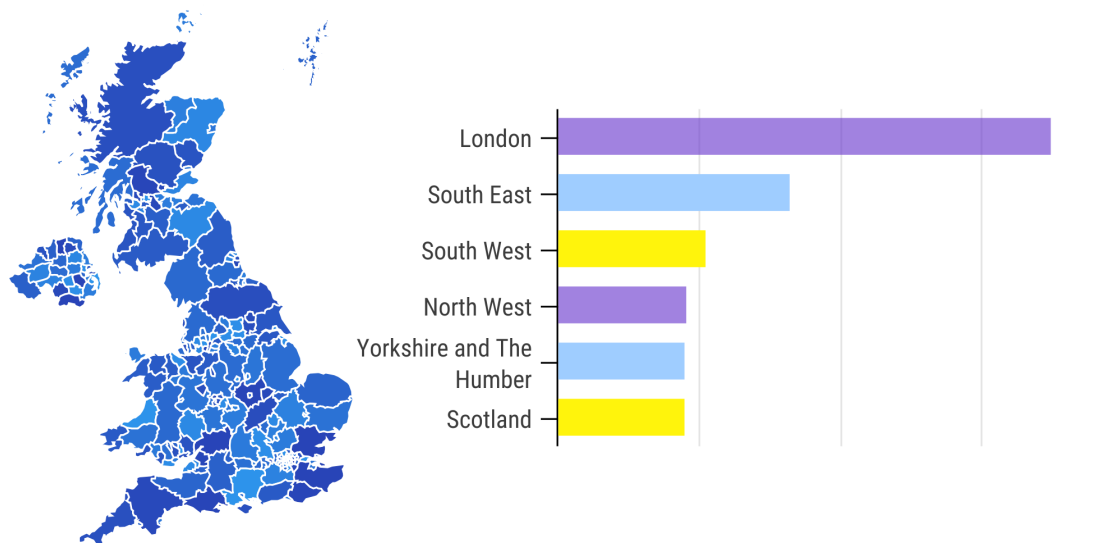


The Roadshows

We will run six, CPD-accredited road shows around the UK from mid - late February 2018. These will include 4-5 speakers with half hour presentation slots focusing on the Future of Advice.

Additionally, there will also be the opportunity to take exhibition space at each location for companies that wish to display their brand, products and services.

These one-day events will be held in six key locations, based on the Panacea community demographics.



Benefits

- ✓ Raise awareness of your brand and proposition
- ✓ Positioning of your brand within the Thought Leadership space
- ✓ Create networking opportunities with clients and prospects
- ✓ Presenting firms will receive delegate list from each location
- ✓ Speaker video will be added to the Panacea BrightTalk channel and included within the auditorium area of the virtual event.

The Virtual Event

The CPD-accredited one day exhibition will allow anyone that was unable to attend the road show events the same opportunity, via virtual reality software from their desktop PC or mobile device.

- ✓ Demonstrate your expertise and capabilities to a proactive audience
- ✓ Receive detailed information on everyone who has attended the event, visited your stand and downloaded content for follow up
- ✓ Use existing digital assets that you already have available such as videos, articles and brochures – making them work harder for you
- ✓ Hold Q&A sessions with keynote speakers on your stand to attract an audience
- ✓ Conversations via the online chat mode can be saved and referred back to for reference

View our dedicated virtual event Brochure for further information.



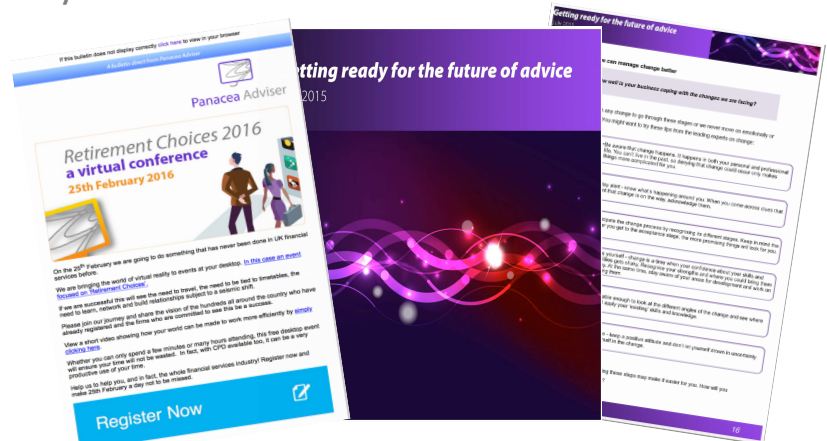
Virtual Event Objectives

- ✓ To provide advisers with easy access to high quality thought leadership and ideas to shape their business
- ✓ Facilitate professional networking between advisers, peers and provider firms
- ✓ Encourage business development opportunities
- ✓ Offer Continuing Professional Development

The Promotional campaign

The promotional campaign will support the guide, microsite, road show and the virtual event and will run 8th January 2018 until 20th April 2018 via:

- ✓ Solus emails and dedicated Future of Advice 'Bento' email bulletins (approximately 17,000 subscribers)
- ✓ Intensive social media programme – posted in all relevant adviser groups on LinkedIn (46 in total with an outreach of 500,000), Twitter (over 3600 followers) and The Panacea Adviser group - empoweringadvisers.com (over 1,050).
- ✓ External promotion by a number of Panacea strategic partners including trade bodies and other support services.
- ✓ PR campaign
- ✓ Promotion of events by all participating organisations
- ✓ **PLUS** for those organisations that contribute toward the guide, we will create a customised PDF document which includes your own editorial and company profile which is a great opportunity to showcase your expertise via your own channels.



Campaign Time Line



Benefits

- ✓ The Future of Advice campaign will help your company increase its visibility as a thought leader via one of the largest adviser engagement platforms in the UK.
- ✓ The campaign represents a great opportunity to share your valuable views on key topics and deliver your message to the right audience.
- ✓ Your involvement will position your company as a key industry player directly in to the target group of professionals.
- ✓ Increases brand awareness and boost your brand's reputation.
- ✓ Offers a guaranteed 12-month visibility within the advisory space.
- ✓ Offers multi-channel promotion and distribution which will maximise your companies visibility.
- ✓ Deliver must-know information about your company across a complete company profile feature.
- ✓ Can act as lead generation opportunity.
- ✓ Further opportunities for face to face exposure via a series of events

Costs

GUIDE & MICROSITE.....	£5,000.00
- 900 word Thought Leadership article in Future of Advice Guide - Full company profile & logo in guide and on database within microsite - Customised PDF for you to use - Unlimited relevant links on Future of Advice microsite - Logo on home page of microsite - Data of everyone that downloads the guide	
LIMITED GUIDE & MICROSITE PRESENCE.....	£2,500.00
- 450 word Thought Leadership article in Future of Advice Guide - Full company profile & logo in guide and on database in microsite - Unlimited relevant links on Future of Advice microsite	
ROAD SHOW.....	£4,000.00
- Speaking slot at six CPD-accredited events around the UK - Inclusion in all road show promotional material - Road show attendee data for follow-up - Video of presentation to be shown in auditorium of virtual event & added to Panacea BrightTalk channel	
EXHIBITION STAND.....	£995.00
- One small exhibition or pop-up stand at six road show events around the UK	
VIRTUAL EVENT.....	£5,000.00
- Medium sized virtual stand including 2 wall graphics, 7 posters, 3 videos, 10 brochures and 3 assistants - Company logo and profile included on the event website and all other promotional material - Training & support - One banner advertisements and one billboard advertisement to be used around the pavilion - Booth analytics, details of attendees that visited your stand and event attendee data for follow-up	

All prices exclude VAT

Contact us!



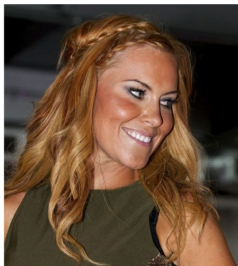
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