THE GREAT WRAPPER RESET *TOUR*

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Wednesday 16 September 2026 | Bolton Wanderers Football Club, Bolton, BL6 6JW

AGENDA

9.00am	Registration opens and refreshments served
9.30am	**Matthew Jonas – Senior Business Development Manager, AJ Bell Investcentre** **Introducing the Great Wrapper Reset** Your regional Business Development Manager will provide a brief overview of AJ Bell's latest financials, and update you on our planned platform developments. Matthew will also introduce our latest research – The Great Wrapper Reset.
9.45am	**Lisa Webster – Senior Technical Consultant, AJ Bell** **Technical round-up: The rules are changing – is your planning strategy?** Join one of AJ Bell's Senior Technical Consultants, Lisa Webster, for a practical update on the Biggest planning changes facing advisers. She'll explore the new ISA rules arriving in April 2027, including restrictions on cash and cash-like investments, charges on interest and what the reforms mean for clients. She'll also provide the latest update on pensions and inheritance tax, examining whether the widely-discussed 'pension first' retirement income strategy is really the right answer. Finally, Lisa will discuss AJ Bell's Great Wrapper Reset – a fresh look at wrapper strategies in a world of rising complexity, evolving tax rules and changing retirement planning assumptions.
10.15am	**Dan Eachus – Business Development Manager, AJ Bell Investments** **10 years on: ready for the reset** Our investment expert will demonstrate how the AJ Bell Investments' range can be harnessed to help advisers navigate the Great Wrapper Reset challenge. He'll also provide a more general update on our core MPS range and raise a glass to celebrate our 10-year anniversary.
10.30am	**Mallika Bhaskar – Behavioural Architect Manager, Cowry Consulting** **Why do clients make decisions that don't always make sense?** Clients don't usually make decisions with spreadsheets. They tend to make them with instincts, emotions, habits and biases. From ISA choices to retirement planning, financial decisions are influenced by far more than facts and figures – and helping clients navigate these choices is only becoming harder in an increasingly complex financial landscape. For financial advisers,understanding the psychology behind these decisions can be the difference between simply providing advice and truly guiding confident action as part of The Great Wrapper Reset. Join behavioural science expert Mallika Bhaskar for a fast-paced, interactive session exploring the weird and wonderful ways our minds work. Through real-world examples and practical insights, Mallika will unpack the hidden biases and mental shortcuts that shape your clients' behaviour, revealing how financial advisers can harness simple behavioural science principles to make financial conversations more engaging and impactful. You'll leave with practical tips on how to help clients cut through complexity, make more confident decisions and ultimately build stronger, more trusted relationships along the way. Because financial decisions are ultimately human decisions first.
11.00am	**Close**