THE GREAT WRAPPER RESET *TOUR*

AJBell
Feel good, advising.

Tuesday 22 September 2026 Moorgate Place, London, EC2R 6EA

AGENDA

9.00am	Registration opens and refreshments served
9.30am	**Alex Iveson – Sales Lead (London), AJ Bell Investcentre** **Introducing the Great Wrapper Reset** Your regional Sales Lead will provide a brief overview of AJ Bell's latest financials, and update you on our planned platform developments. Alex will also introduce our latest research – The Great Wrapper Reset.
9.45am	**Russ Mould – Investment Director, AJ Bell** **Outlook for 2027** In his talk, our Investment Director, Russ Mould, will look at the potential outlook for economies, markets and portfolios in the year ahead and beyond, helping you to sense check if your investment strategies and solutions are well equipped for market changes.
10.05am	**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.
10.35am	**Nicky Sevel – CEO, Woven Advice** **Navigating change with confidence** The Great Wrapper Reset is, by definition, a time of change and flux for clients and advisers alike. That may sound daunting, but with the right support, switching assets from one wrapper to another – or even moving clients from one platform to another – can be a straightforward operation. In this talk, Nicky explains how her company can support you by removing the complexity that usually comes with change.
10.50am	**Brian Donald – 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.
11.00am	**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.
11.30am	**Close**