

BANKHALL • PMS •

CONNECT 2024

Tomorrow, together

#TomorrowTogether

Welcome to Bankhall PMS Connect 2024!

Thank you for taking the time to join us at the first ever Bankhall PMS Connect event.

After a year of more economic worry and uncertainty, and the impact of regulatory change from Consumer Duty, it was really important to us all here at Bankhall and PMS to create time to bring our adviser community together. That's why we're bringing you Bankhall PMS Connect, to reflect on the challenges we all face – as well as the many opportunities – and share the ways in which Bankhall and PMS are working to support you in 2024 and beyond.

Today, you can design your own agenda, choosing the sessions that will be of most value to you and your firm.

We've packed each session full of actionable insights on the key trends and topics in the market, while creating space for networking so you can discuss best practice with your fellow advisers and business owners. Crucially, we've curated today's sessions and speakers with you in mind, bringing you access to the expertise you need to help you grow your business in 2024, with the full support of Bankhall and PMS.

We really want to hear from you - so please, do get involved, share your feedback, and ask your questions.

The insights we gather today will help shape the future services and support you receive from Bankhall and PMS, so that we can build a brighter tomorrow, together.

Best wishes,



Alex Beavis
Group Director of
Mortgages & Protection

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What's on?

11am

Protection:
Beyond the Basics

● Theatre 1

Strategies For
Growth

● Theatre 2

Preparing Your Business
For Growth Or Your Exit

● Theatre 3

Break and exhibition

12pm

Protection:
Beyond the Basics

● Theatre 1

Mission Control: Making
Tech Work For You

● Theatre 2

Thriving Under
Consumer Duty

● Theatre 3

Lunch and exhibition

1.50pm

Protection
Panel

● Theatre 1

Financial Crime: The Good,
The Bad And The Ugly

● Theatre 2

Break and exhibition

2.40pm

On The
Horizon

● Theatre 1

Lead To
Succeed

● Theatre 2

Exhibitors



The sessions, in more detail...

Protection: Beyond the basics

The why, the what and the how: join this session to discover how you can use some of the overlooked areas of protection advice to maximise your opportunities.

Strategies For Growth

This session will give you top tips on how you can grow your online presence, build your brand and increase lead generation through your marketing and social media.

Preparing Your Business For Growth Or Your Exit

Thinking of growing your business through acquisition? Or maybe you're just keen to understand how to successfully exit your business. This session explores how you can best position your business for what you want to achieve, and explore the support you may need.

Mission Control: Making Tech Work For You

Join us to explore tech's evolving role in our industry, and how to make it do the heavy lifting in your business in light of Consumer Duty.

Thriving Under Consumer Duty

How will Consumer Duty help you grow? In this session, you'll hear how delivering better customer outcomes could be the opportunity of a lifetime for you and your business.



Protection Panel

Our expert panel will share market insights, discuss the protection support available, and answer your burning questions!

Financial Crime: The Good, The Bad And The Ugly

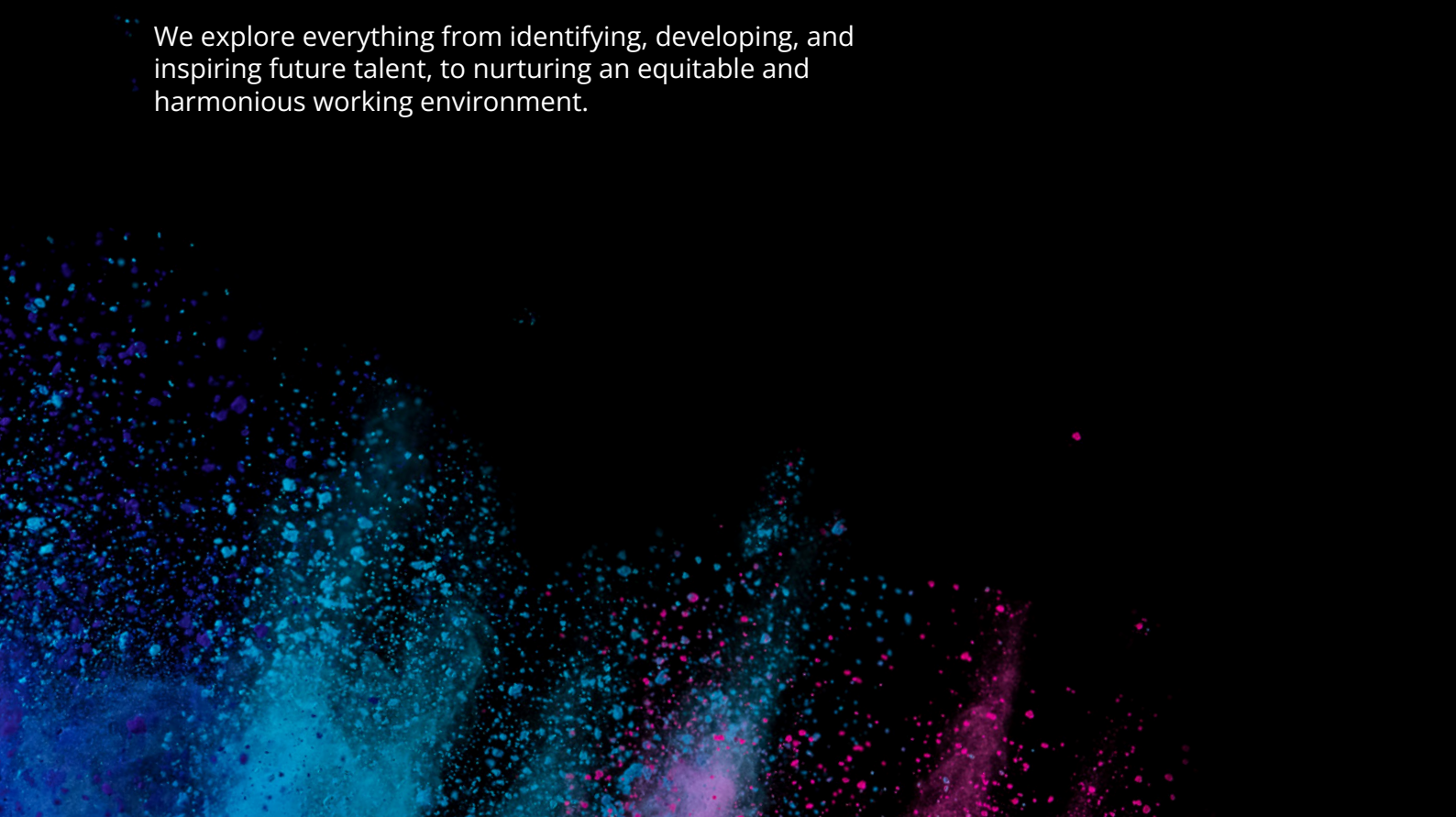
With financial crime on the up, in this session you'll learn how to spot the telltale signs, and protect yourself and your business.

On The Horizon

Regulatory challenges keeping you up at night? Join our experts to discuss how to deal with these and understand what's next in 2024 and beyond...

Lead To Succeed

We explore everything from identifying, developing, and inspiring future talent, to nurturing an equitable and harmonious working environment.





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