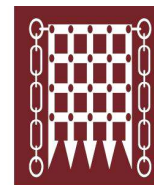


Westminster Business Forum policy conference
Options for investment management reform - advice, governance, and strengthening investment market performance and consumer protection

Timing: Morning, Thursday, 10th December 2020

Draft agenda subject to change



**WESTMINSTER
BUSINESS
FORUM**

- 8.30 - 9.00 Registration and coffee
- 9.00 - 9.05 **Chair's opening remarks**
Senior Parliamentarian
- 9.05 - 9.25 **The future for the retail investment market in the UK**
Jonathan Lipkin, Director, Policy, Strategy and Research, The Investment Association
Questions and comments from the floor
- 9.25 - 10.05 **Investment market performance and preventing fund failure - value for money, adapting to consumer trends, and protecting investors**
Professor Janette Rutterford, Professor of Financial Management, The Open University
Peter Behrens, Chief Commercial Officer, RateSetter
Senior representative, financial adviser
Questions and comments from the floor
- 10.05 - 10.45 **Key issues for governance, transparency and culture**
James Suter, Divisional Director, London Economics
Senior representative, investment management
Senior representative, pension fund
Questions and comments from the floor
- 10.45 - 10.50 **Chair's closing remarks**
Senior Parliamentarian
- 10.50 - 11.15 Coffee
- 11.15 - 11.20 **Chair's opening remarks**
Senior Parliamentarian
- 11.20 - 11.40 **The framework for effective stewardship and implementing the revised Stewardship Code**
Senior speaker to be confirmed
Questions and comments from the floor
- 11.40 - 12.30 **Adapting to the changing market for financial advice - regulation, innovation and addressing the advice gap**
Daniel Broby, Director, Centre for Financial Regulation and Innovation, Strathclyde Business School
Paula Steele, Managing Partner, John Lamb
Alistair McQueen, Head, Savings & Retirement, Aviva
Senior representative, robo-advice platform
Questions and comments from the floor
- 12.30 - 12.55 **Next steps for the regulation of retail investments**
Senior speaker to be confirmed
Questions and comments from the floor
- 12.55 - 13.00 **Chair's and Westminster Business Forum closing remarks**
Senior Parliamentarian
Peter van Gelder, Director, Westminster Business Forum