Unlocking your potential: leveraging Standard Life events and training to transform financial planning businesses

John Fitzgerald, Regional Manager, Standard Life

THE demands of today's financial advice industry are wide-reaching and can be seen as equal parts onerous and rewarding. Financial advisers are faced with increasing demands not only to manage client portfolios but also to navigate the complexities of human emotions, relationships, and behaviour around money. The challenge we aim to support you with is: how can advisers adapt and grow their businesses while staying true to their commitment to clients' long-term financial well-being?

Supporting you to maximise this opportunity is Standard Life's mission. The support, tools, and content we provide financial advisers are developed with this aim in mind. We've rolled out an event calendar to help provide you with solutions. By blending client-centric insights with actionable business strategies, we advocate for a holistic approach to both financial planning and running your financial planning business. We aim to support the future of financial advice by focusing on the human side of money – bringing together the science of financial planning and the art of personal connections.

Standard Life events

Our 2025 calendar of events available to you includes:

1. **Industry insight webinar series**

   We run regular webinars to help you navigate changes to our industry. Ranging from product updates, changing regulatory requirements, to capitalising on technical expertise to target business growth opportunities and getting ahead of consumer attitudes and sentiments to see how we can better support clients' journeys to and through retirement.

2. **Masterclasses with our experts**

   Through your Business Manager, you can access our in-house experts from our Investments and Retirement Solutions teams. Have a topic you need support on? Reach out to a Business Manager and we'll come to you with the right experts to help you and your business.

3. **Roadshows to come together and learn from each other**

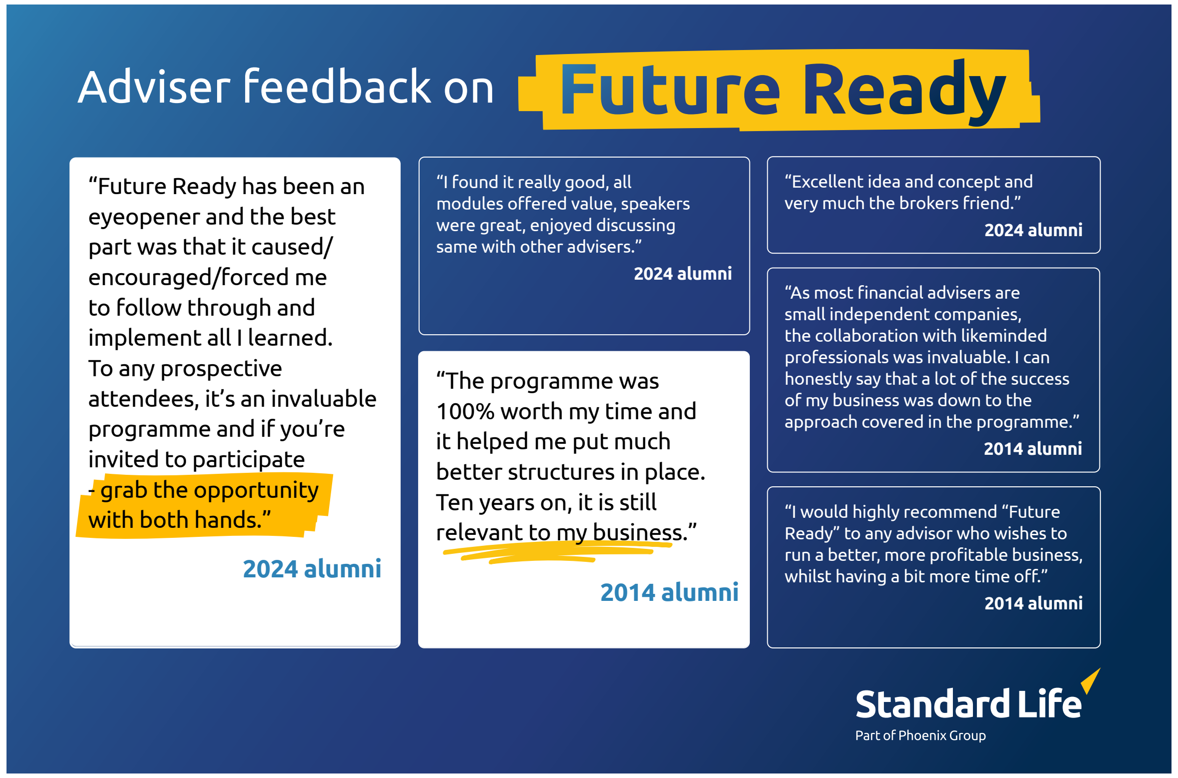
   When we invite you to spend your time at one of our events, our starting line is how can we add value, share insight, and move the dial for your business. Our topics range from insights from the voice of the retiree, supporting meaningful client conversations, women and pensions, to thought leadership from industry visionaries like Vanguard, as well as best practice case studies and success stories from industry peers in international markets.

4. **Flagship "Future Ready" programme**

   Ten years after we first ran Future Ready, we brought it back last year to positive reception. The six-module series supports adviser's businesses now and helps them to plan for where they'd like to take it next.

Future Ready from Standard Life

Running a business is all-consuming and finding time to work on the business as opposed to in the business is difficult. The Future Ready programme is designed to empower you with information, tools, frameworks, and insights needed to not only improve client relationships but also streamline and grow your business. The programme combines six modules with experts in their field providing thought provoking, actionable content to change the way you approach all aspects of your business.



Why attend?

From tried and tested strategies, to cheat sheets and quick wins – we tailor the programme to the realities of our industry, championing growth and innovation within the practicalities of balancing your business objectives and your client outcomes.

Here's why Future Ready is essential for your professional development:

1. **Holistic financial planning: the route to long-term success**

   Successful financial advising isn't just about managing assets; it's about understanding your clients on a deeper level. We focus on the human side of financial planning—helping you address the emotional and psychological influence on financial decision-making to build stronger, more trusted relationships, which can lead to long-term success and loyalty.

2. **Client insights that drive business growth**

   Interactive sessions and real-world case studies, we share insights from our proprietary research, the wider market, processes and templates, and the lived experience of industry leaders. We package these for you to take away and leverage for your own business growth.

3. **Best business practices for the modern adviser**

   The world of financial advising is constantly changing. New technologies, regulatory updates, and shifting client expectations mean you need to stay ahead of the curve. We offer practical guidance on integrating industry best practices into your business model.

4. **Practical, actionable strategies**

   Going beyond the theory, we provide you with actionable strategies you can immediately apply to your business, giving you concrete steps to implement into your day-to-day. Whether it's tips to mastering holistic client conversations or revamping your marketing approach, you'll leave with clear, executable steps that can make an immediate impact on your practice.

5. **Networking and peer-to-peer learning**

   We appreciate that you run a different business to the one we do, and we don't have all the answers. However, we can see that bringing together like-minded advisers helps to solve a lot of the day-to-day challenges of running a business. Our events foster a collaborative environment where you can connect with other financial advisers facing similar challenges and opportunities.

We're proud of the feedback we've received from alumni of Future Ready and from advisers who attended our wider programme of events last year. Hearing how we're helping to unlock more opportunities within your businesses, and with your customers, is motivating us as we put the finishing touches to our 2025 events calendar. Register your interest for this year's Future Ready programme and other Standard Life events with your Business Manager.

iSure appoints Senior PI Lead for Ireland

ISURE, the specialist SME insurance provider in Ireland, part of the international Specialty (Re)insurance MGA Rokstone, has announced the appointment of a **Senior Professional Indemnity (PI) Underwriter** and leading industry figure, **Terry Dunne**, based in its Cavan office.

At iSure, Terry will be focussed on developing its Professional Indemnity product for the Irish Retail Broker market. The appointment means that brokers in Ireland can now go directly to iSure, for access to A rated PI capacity with quality policy wordings and claims handling service for a broad range of professions, without having to go via wholesale markets to London.

Terry Dunne joins with 25 years' experience of PI in both broking and underwriting. He has previously served at Howden's Aston Lark as Head of PI Ireland, and spent seven years as Associate Director at Gallagher's First Ireland Risk Management. He has held further senior roles as a PI specialist with a number of other leading brokers and underwriters in Ireland including AmTrust, Travelers, Aon, Campion and Dolmen.

Drawing on A+ (Standard & Poor's) rated capacity from Great American International Insurance (EU) DAC, the iSure PI facility is for professional and financial lines risks up to a €5m limit. iSure is based in Cavan and is authorised and regulated by the Central Bank of Ireland. It currently insures more than 12,000 businesses in Ireland.

Sean Murray, CEO of iSure, comments: *"Terry's appointment demonstrates our commitment to attracting, retaining, and developing top talent to continue to expand in our chosen products and sectors and give brokers the best possible service. We can now offer brokers in Ireland direct access to Great American A+ rated capacity for PI risks without having to go via wholesale markets to London. Terry's career, straddling both broking and underwriting, also means he has a unique insight into the needs of Irish brokers. The appointment is great news for our brokers and is another step forward in our ambition to becoming one of the most recognisable and trusted Commercial Insurance names in the Irish market.*

Terry added: *"From my first conversation with Sean and the management team, it was plain to see that iSure and Rokstone are doing the right things and the standards are very high. When the ambition and strategy for the company was laid out to me, I knew it was something I wanted to be a part of. I am very much looking forward to joining the outstanding team at iSure and playing an integral part in its continued growth and success."*