

CMA ENVISION CONFERENCE

13th & 14th October 2023

ENVISION

cma conference

www.communitymoneyadvice.com

Agenda

Friday

- 1.00 Registration with Tea & Coffee
- 1.45 Introduction, Prayer and Worship
Tea & coffee will be available in The Base for any who would prefer not to take part
- 2.25 Presentations
- 2.45 Address – Heather Keates; Founder and CEO
- 3.00 New Catalyst - Key Developments – Chris Marriott
- 3.30 Tea & Coffee break (meet new people, share experience)
- 4.00 Seminars:
1. *Managing Staff & Volunteers* – John Franks
 2. *Every Adviser's Guide to Debt Relief Orders* – Claire Daniels
 3. *Getting to grips with New Catalyst* – Chris Marriott
 4. *Connect Seminar: helping our clients to get the best help possible!* – Kim Vickers
 5. *Consumer Duty and Vulnerability* – Heather Keates & Steve Bolton
- 5.00 Client Story – Wrekin Debt Advice (winners of the IMA debt advice team of the year)
- 5.10 Final Comments
-§- Drinks and nibbles for those wishing to remain at the venue - *The Base* -§-
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- 7.00 Dinner & Socialising (Dinner is at 7.30pm)

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Saturday

9.00 Registration with Tea & Coffee

9.45 Introduction, Prayer and Worship

Tea & coffee will be available in the The Base for any who would prefer not to take part

10.15 Keynote Address – Anna Brading; Mentora Money

11.00 Tea & Coffee break (meet new people, share experience)

11.30 Acts 435 - how could you be involved? – Claire Daniels

11.55 Update on CHAP Kenya – Phil Downward

12.00 Seminars:

1. *Managing Staff & Volunteers* – John Franks
2. *Every Adviser's Guide to Debt Relief Orders* – Claire Daniels
3. *Getting to grips with New Catalyst* – Chris Marriott
4. *Connect Seminar: helping our clients to get the best help possible!* – Kim Vickers
5. *Consumer Duty and Vulnerability* – Heather Keates & Steve Bolton

1.00 Buffet Lunch

2.00 Business Development – Martin Bethell

2.15 Breakout Discussion Groups

3.00 Open Q&A – Heather Keates & John Franks

3.45 CMA; The Year Ahead – John Franks

4.00 Closing Comments and Prayers – Julian Mander; CMA Chair of Trustees

§ Departure §