Building a data-driven advice firm: How to manage, use and report your data

SPECIAL GUESTS



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Zoe Bennett

Senior Delivery Manager, Woven Advice



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Financial Services Director at Dynamic Planner



Chris Baigent-Reed

Founder and Managing Director, Jigsaw Tree

What we'll cover

1. Introduction
2. Data governance and practical integration
3. Data, Tech and practical implementation
4. Reg reporting and Consumer Duty
5. Chair led panel and Q&A
6. Summary and close

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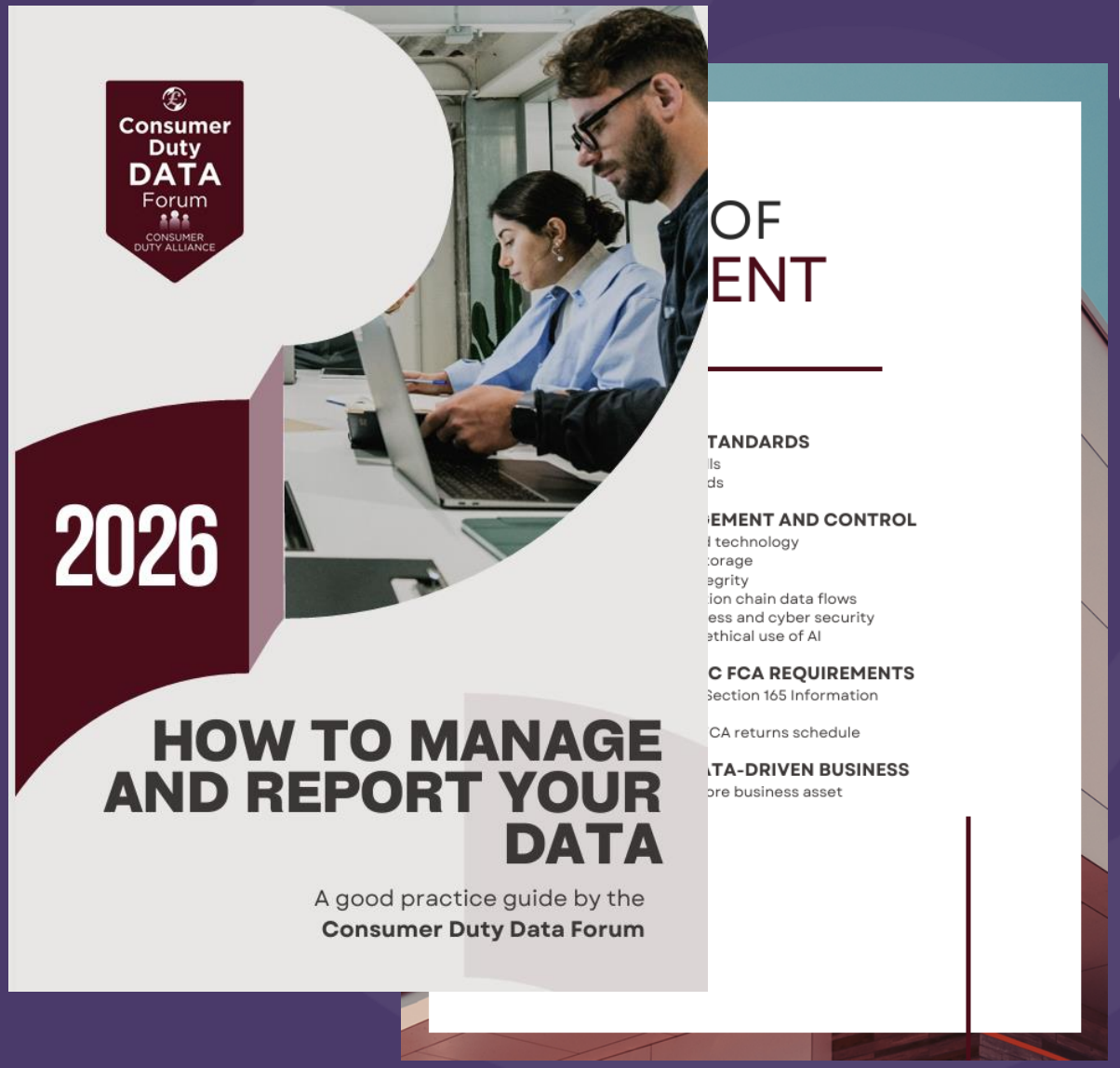
RAISING STANDARDS TOGETHER

How to manage and report your data

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Any questions?

Ask them in the chat

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