

WELCOME TO

HOME GAMES

Clabrdn

Criterion

 Fidelity
INTERNATIONAL

nucleus^o

Parmenion

Quilter

SCOTTISH WIDOWS



START GAME



MARK POLSON



COMPANY

THE LANG CAT

ROLE

PRINCIPAL

SPECIAL SKILL

NONE

STEVE NELSON



COMPANY

THE LANG CAT

ROLE

INSIGHT DIRECTOR

SPECIAL SKILL

TELEPATHY



LAST CHANCE!
**CAST YOUR
VOTES
HERE**

#LANGCATLIVE

HOME GAME 3



THE ORACLE

ABILITY: BEGINNER

HOME GAME 3

LEVEL 1

THE QUEST BEGINS

LEVEL 1

HOME GAME 2



LEVEL 1

STARLING CTA

HOME GAME 3



JASON MAUDE

COMPANY

STARLING

ROLE

CTA

SPECIAL SKILL

PEDAGOGY

#LANGCATLIVE

HOME GAME 3



THE ORACLE

LEVEL 1

STARLING CTA

HOME GAME 3



JASON MAUDE

COMPANY

STARLING

ROLE

CTA

SPECIAL SKILL

PEDAGOGY

LEVEL 1

HOME GAME 2

WHAT OUR DATA TELLS US

STEVE NELSON



COMPANY

THE LANG CAT

ROLE

INSIGHT DIRECTOR

SPECIAL SKILL

TELEPATHY

RICH MAYOR



COMPANY

THE LANG CAT

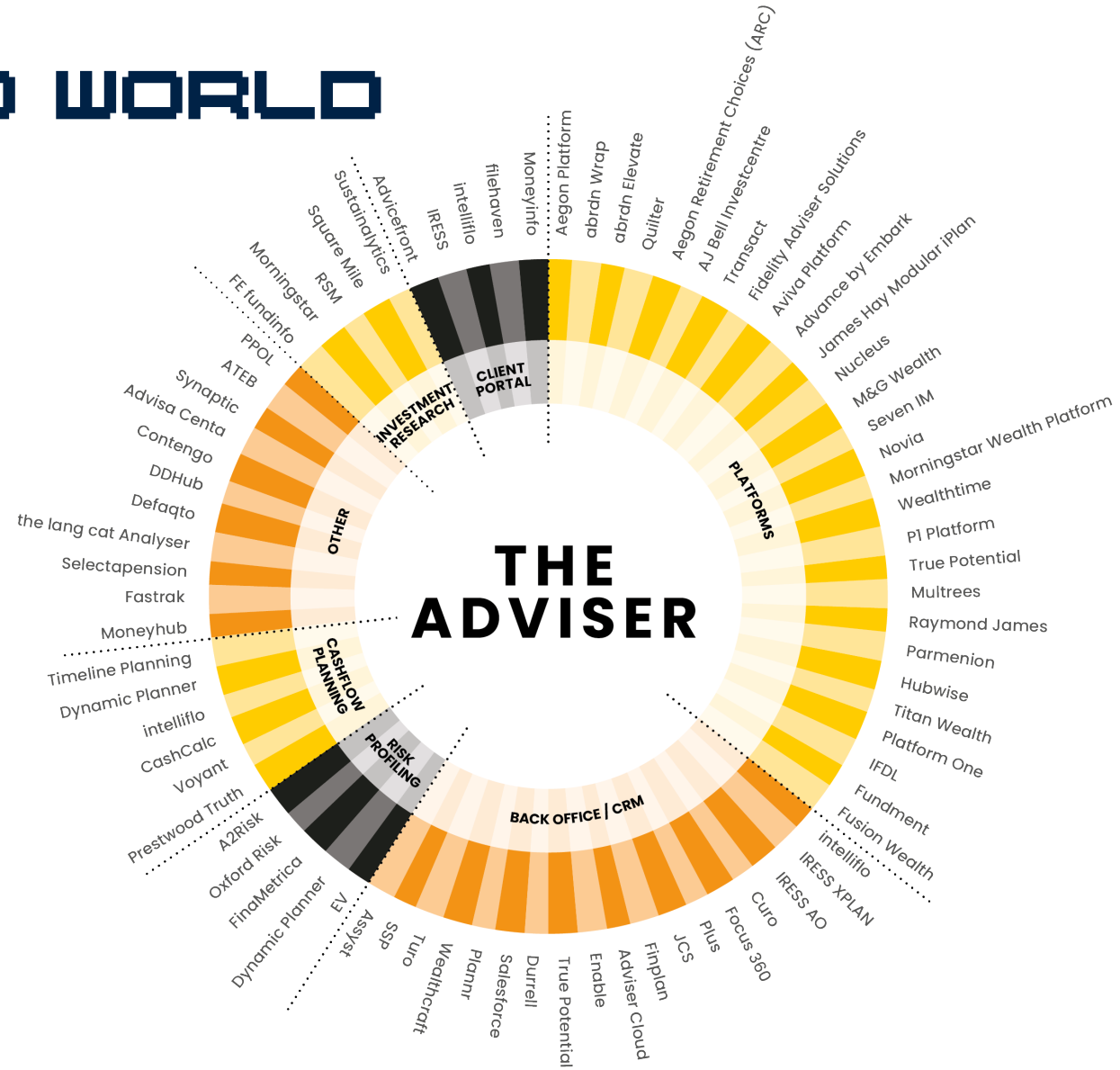
ROLE

SENIOR ANALYST

SPECIAL SKILL

NERDERY

A FRAGMENTED WORLD



MOST POPULAR ADVISER TECH



| PRACTICE MANAGEMENT | 2022 |
|---------------------|------|
| Intelligent Office | 51% |
| IRESS AO/Xplan | 14% |
| Enable | 3% |
| Time4Advice | 3% |
| True Potential | 4% |
| Bespoke build | 3% |
| Plannr | 2% |



| RISK PROFILING | 2022 |
|-------------------------|------|
| EV | 24% |
| Dynamic Planner | 21% |
| FinaMetrica | 20% |
| Oxford Risk | 11% |
| We've developed our own | 11% |
| Defaqto | 7% |
| Provider tool | 5% |
| Plannr | 4% |

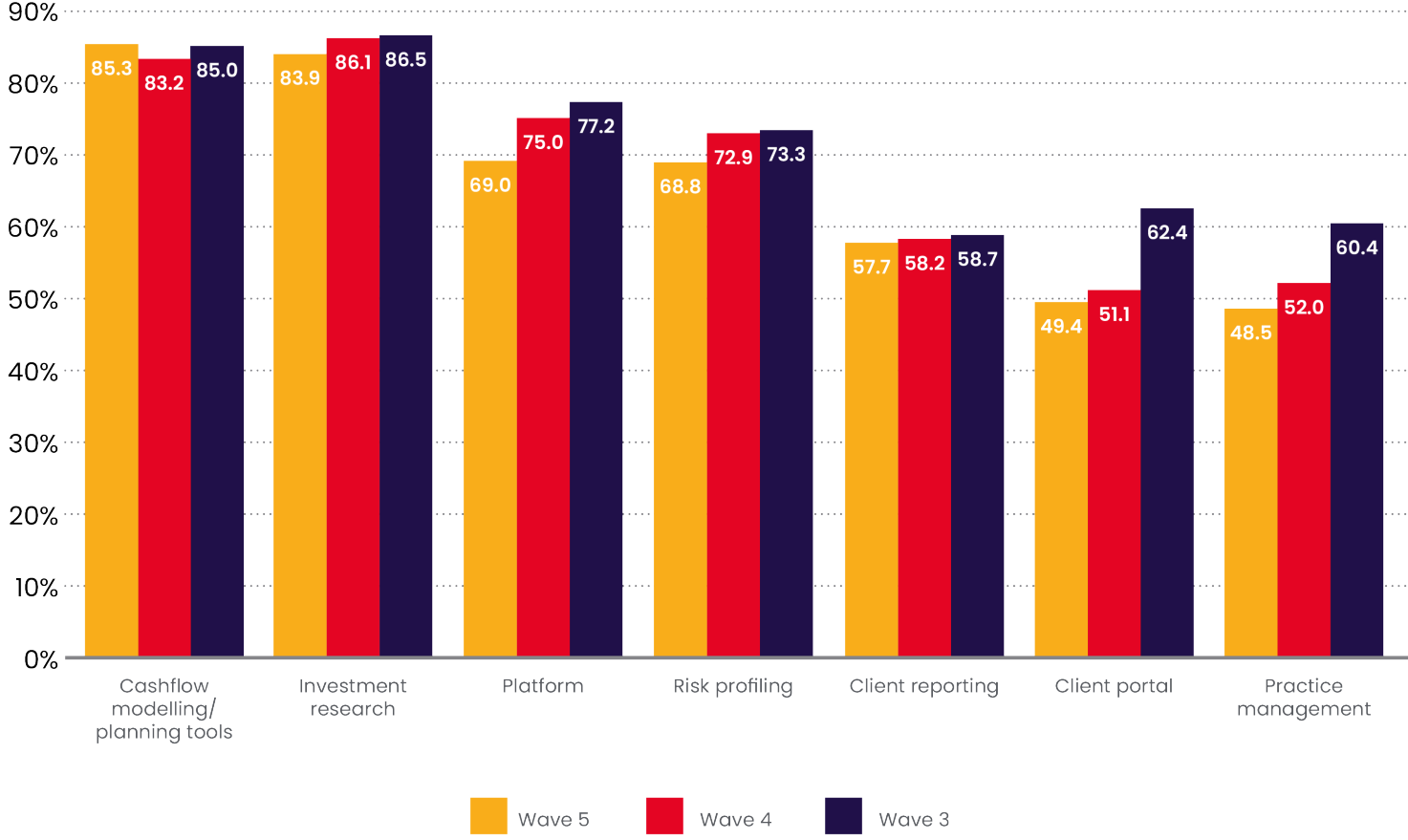


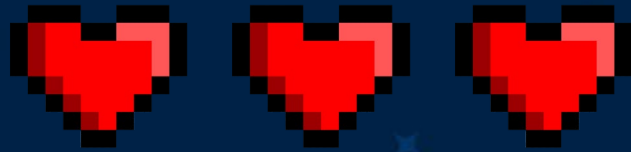
| INVESTMENT RESEARCH | 2022 |
|------------------------------|------|
| FE fundinfo | 77% |
| Morningstar | 26% |
| Defaqto | 24% |
| Rayner Spencer Mills | 13% |
| Square Mile | 10% |
| Integrated platform research | 5% |



| CASHFLOW MODELLING | 2022 |
|-------------------------------|------|
| CashCalc | 44% |
| Voyant | 30% |
| Truth by Prestwood | 10% |
| Timeline | 7% |
| Intelliflo planning (was i4C) | 4% |
| Provider integrated | 4% |
| 7Imagine | 1% |

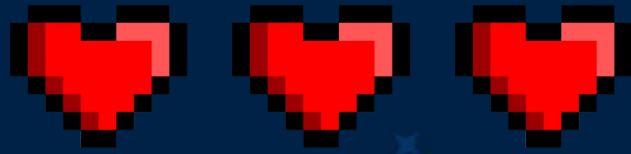
WOULD YOU PICK THE SAME TECH AGAIN?





RATE YOUR HEALTH:

**HOW CONFIDENT ARE YOU THAT YOUR
FIRM IS USING THE RIGHT KIT?**



RATE YOUR HEALTH:

- A. WE'VE NAILED IT & GET THE MOST OUT OF IT
- B. WE'RE HAPPY BUT COULD GET MORE OUT OF IT
- C. IT NEEDS CHANGING. NO IDEA HOW
- D. PEOPLE NOT TECH IS MY ISSUE
- E. IT'S THE BANE OF MY LIFE

RESULT



NAME YOUR NEMESIS

**WHERE, IF ANY, IS THE WEAKEST
POINT IN YOUR ADVICE TECH?**



NAME YOUR NEMESIS

A. PRIMARY PLATFORM

B. OTHER PLATFORMS

C. PRACTICE MANAGEMENT SYSTEM

D. CASHFLOW MODELLING TOOL

E. RISK PROFILING TOOL

The background features a vertical gradient from dark blue at the top to a vibrant purple at the bottom. Scattered throughout are numerous small, light blue and white star-like shapes, some with soft halos, creating a starry or digital aesthetic.

RESULT

LEVEL 1

HOME GAME 2

HOW BROKEN IS THE
SYSTEM REALLY?

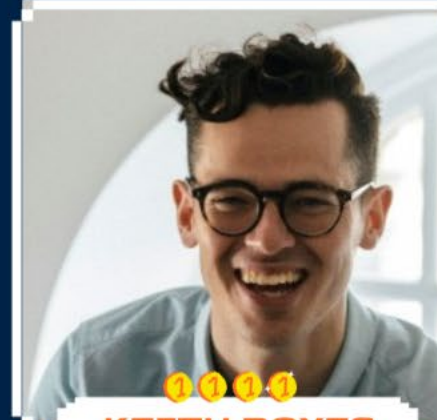


NATALIE HOLT

COMPANY
THE LANG CAT

ROLE
CONTENT EDITOR

SPECIAL SKILL
ULTRACONTENT



KEITH BOYES

COMPANY
SPENTWELL

ROLE
MANAGING DIRECTOR

SPECIAL SKILL
JARGONBUSTING

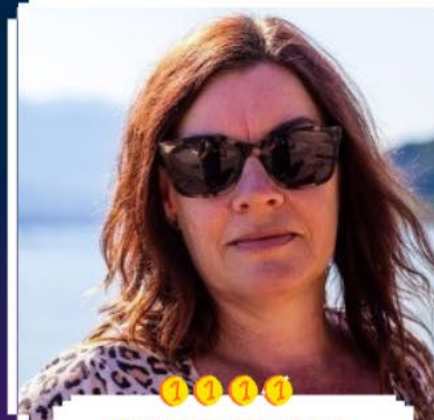


MARCUS FARNFIELD

COMPANY
EMERY LITTLE

ROLE
FINANCIAL PLANNER

SPECIAL SKILL
UBERGEEKERY



KATE SHAW

COMPANY
FLP LTD

ROLE
CHARTERED FINANCIAL PLANNER

SPECIAL SKILL
WELSH

#LANGCATLIVE

HOME GAME 3



THE ORACLE

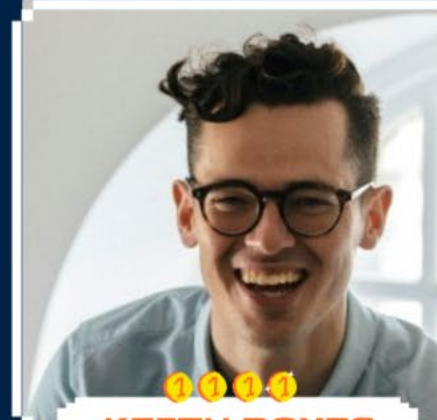


NATALIE HOLT

COMPANY
THE LANG CAT

ROLE
CONTENT EDITOR

SPECIAL SKILL
ULTRACONTENT



KEITH BOYES

COMPANY
SPENTWELL

ROLE
MANAGING DIRECTOR

SPECIAL SKILL
JARGONBUSTING



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UBERGEEKERY



KATE SHAW

COMPANY
FLP LTD

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SPECIAL SKILL
WELSH

LEVEL 2

HOME GAME 2

WHAT OUR DATA TELLS US

STEVE NELSON



COMPANY

THE LANG CAT

ROLE

INSIGHT DIRECTOR

SPECIAL SKILL

TELEPATHY

RICH MAYOR



COMPANY

THE LANG CAT

ROLE

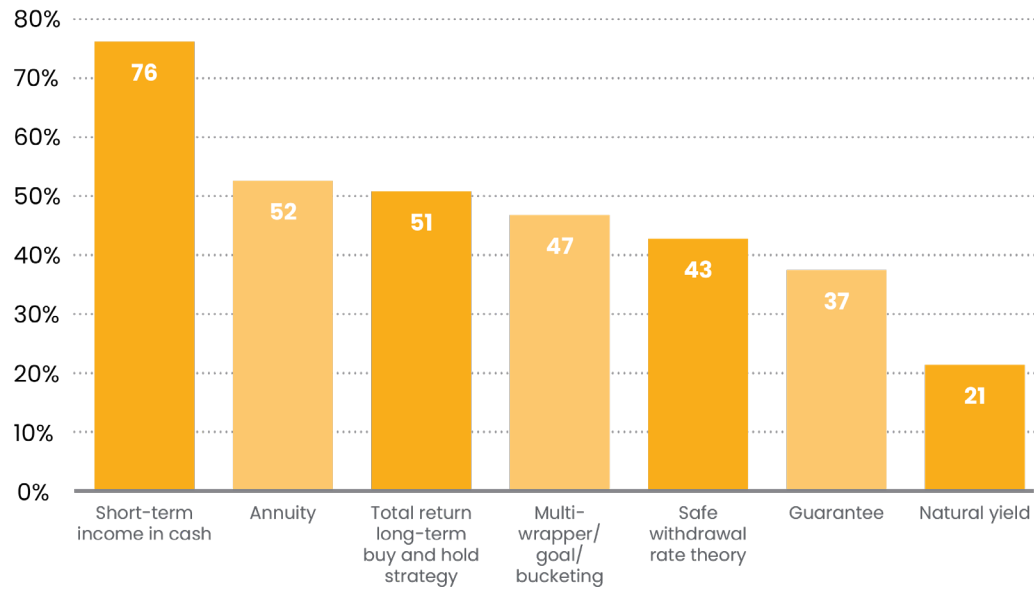
SENIOR ANALYST

SPECIAL SKILL

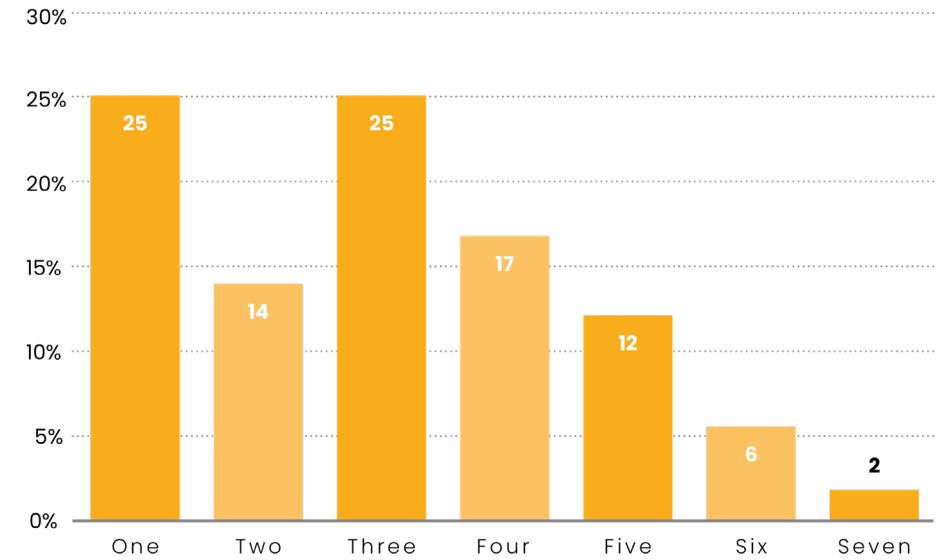
NERDERY

INCOME STRATEGY

Income strategy used for at least some clients



Number of techniques used



LEVEL 2

HOME GAME 2

KEEPING WHAT'S GOOD



NATALIE HOLT

COMPANY
THE LANG CAT

ROLE
CONTENT EDITOR

SPECIAL SKILL
ULTRACONTENT



MARIE MEAGHER

COMPANY
DHARMEA FINANCIAL PLANNING

ROLE
IFA

SPECIAL SKILL
REGENERATION



KAT MOCK

COMPANY
UNITY PARAPLANNING

ROLE
DIRECTOR

SPECIAL SKILL
OMNISCIENCE



ROLAND WHYTE

COMPANY
NOKKEL

ROLE
CEO

SPECIAL SKILL
BRIDGEBUILDING

#LANGCATLIVE

HOME GAME 3



THE ORACLE



NATALIE HOLT

COMPANY
THE LANG CAT

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ROLAND WHYTE

COMPANY
NOKKEL

ROLE
CEO

SPECIAL SKILL
BRIDGEBUILDING

LEVEL 2

HOME GAME 2

NOW YOU CAN
PLAY TOO



**BONUS
LEVEL**

QR code

#LANGCATLIVE

HOME GAME 3

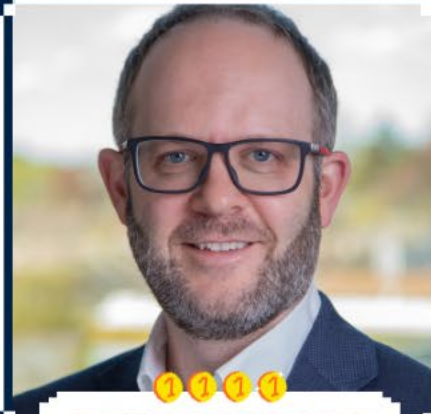
GAME PAUSED

LEVEL 2

HOME GAME 2

PRACTICE MANAGEMENT
SYSTEMS:

SAVE YOUR PROGRESS



1111
BEN HAMMOND

COMPANY
THE LANG CAT

ROLE
CONSULTING DIRECTOR

SPECIAL SKILL
SASSENACH



1111
NICK EATOCK

COMPANY
INTELLIFLO

ROLE
CEO

SPECIAL SKILL
BULLETPROOF



1111
DYLAN NAVRA

COMPANY
MORNINGSTAR WEALTH

ROLE
HEAD OF PRODUCT

SPECIAL SKILL
FLIGHT



1111
PETE RIDLINGTON

COMPANY
NINGI

ROLE
FOUNDER & CEO

SPECIAL SKILL
INVISIBILITY

#LANGCATLIVE

HOME GAME 3



THE ORACLE

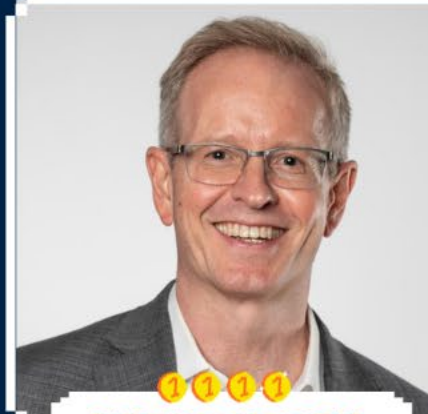


1111
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LEVEL 3

HOME GAME 3

WHAT OUR DATA TELLS US

STEVE NELSON



COMPANY

THE LANG CAT

ROLE

INSIGHT DIRECTOR

SPECIAL SKILL

TELEPATHY

RICH MAYOR



COMPANY

THE LANG CAT

ROLE

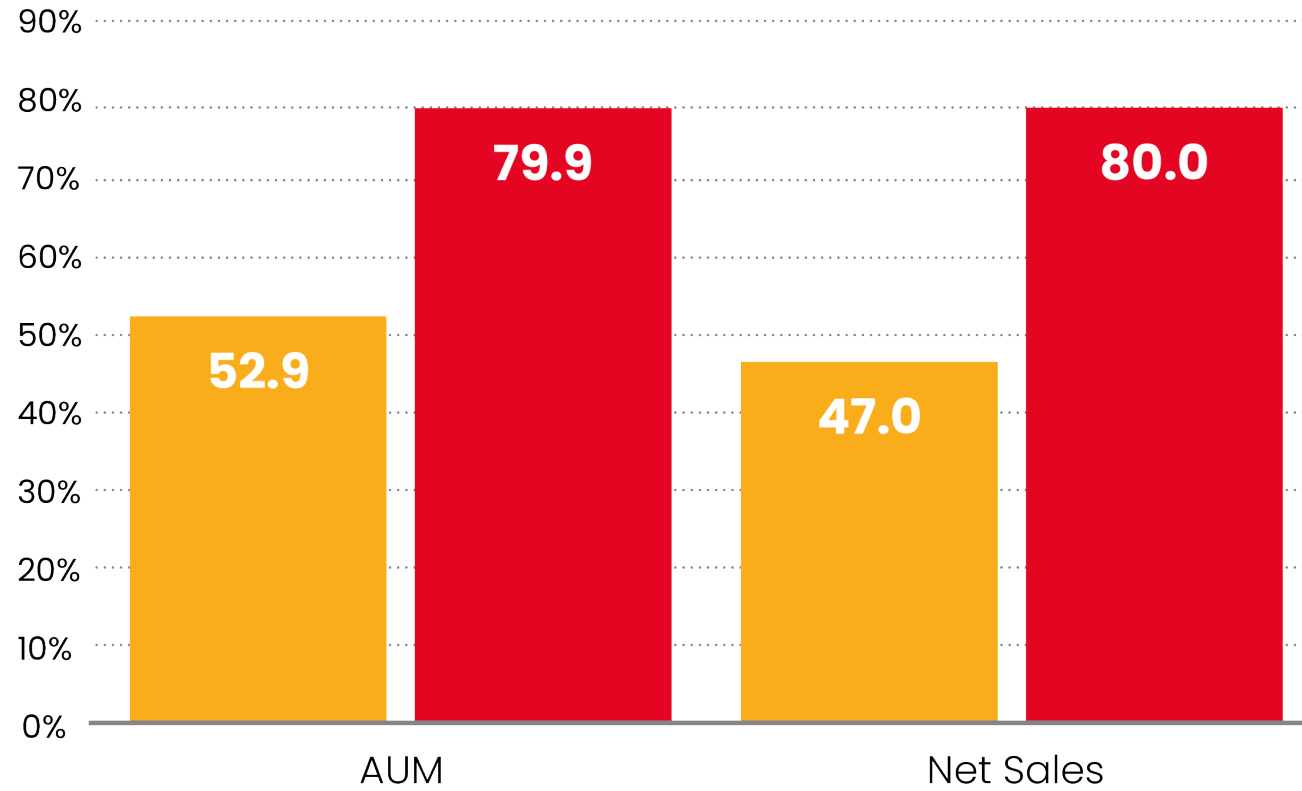
SENIOR ANALYST

SPECIAL SKILL

NERDERY

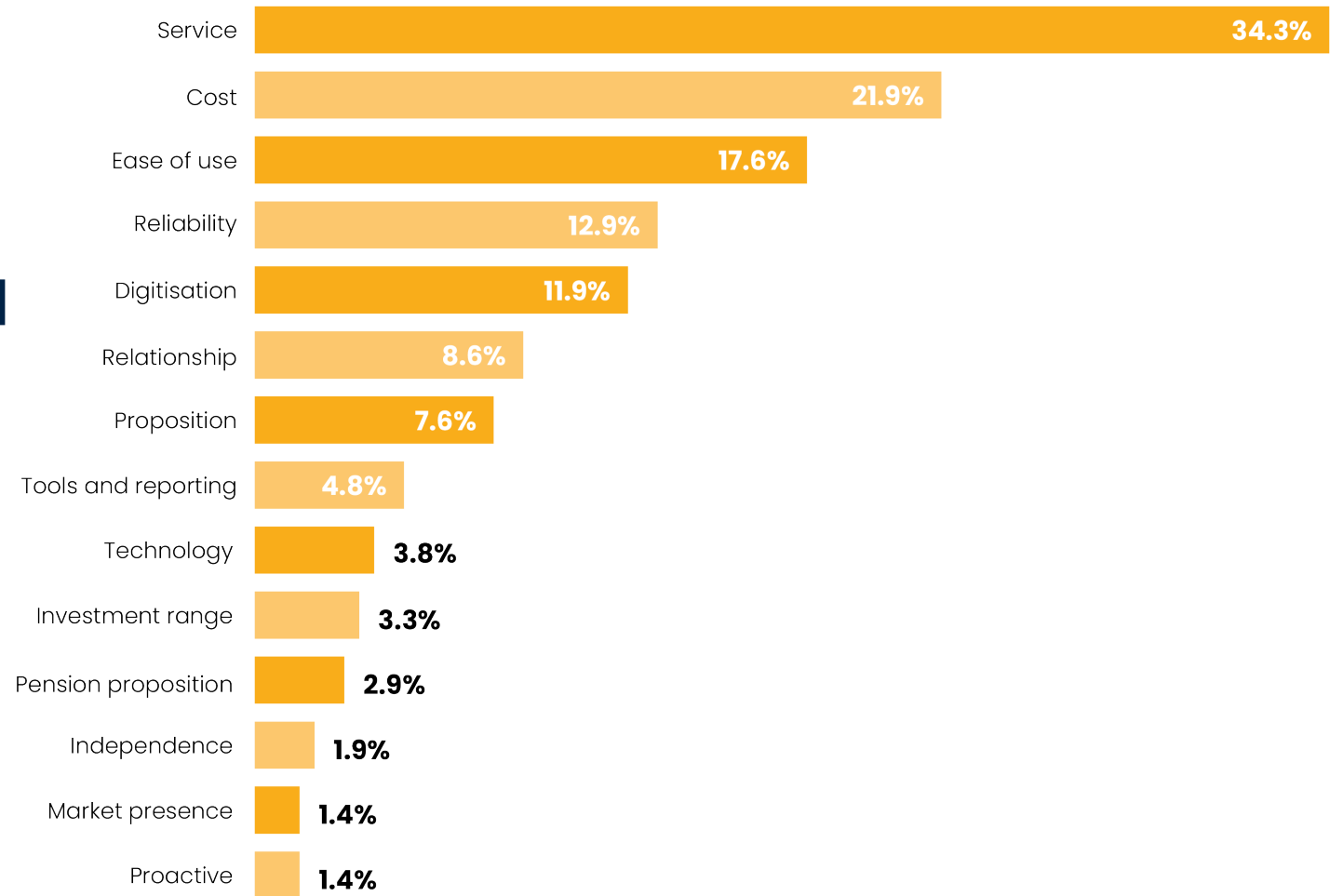
PLATFORM ASSETS

Market Share Q3 2022 - Q2 2023 (Advised)



Top 5 Top 10

WHAT'S THE BEST THING ABOUT YOUR PRIMARY PROVIDER?



LEVEL 3

HOME GAME 2

CAN GENUINE CHANGE
COME FROM
DISRUPTORS

OR

WILL INCUMBENTS
ALWAYS DRIVE
PROGRESS?

MARK POLSON



COMPANY

THE LANG CAT

ROLE

PRINCIPAL

SPECIAL SKILL

NONE

DAVID FERGUSON



COMPANY

SECCL

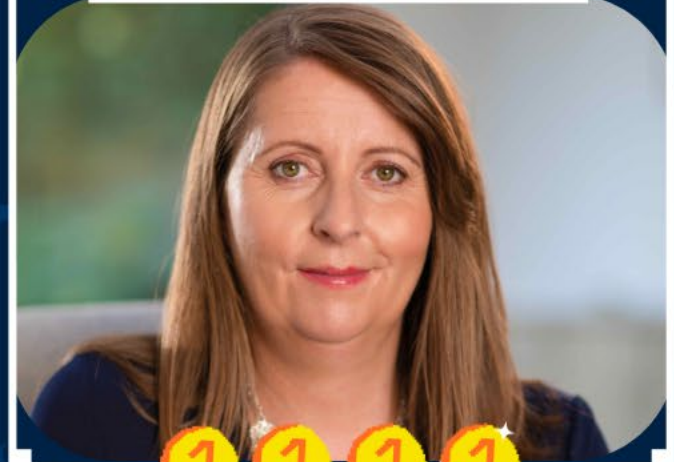
ROLE

CHIEF EXECUTIVE

SPECIAL SKILL

WAVEMAKING

JACKIE LEIPER



COMPANY

SCOTTISH WIDOWS

ROLE

MANAGING DIRECTOR

SPECIAL SKILL

UNSHAKEABLE

#LANGCATLIVE

HOME GAME 3



THE ORACLE

MARK POLSON



COMPANY

THE LANG CAT

ROLE

PRINCIPAL

SPECIAL SKILL

NONE

DAVID FERGUSON



COMPANY

SECCL

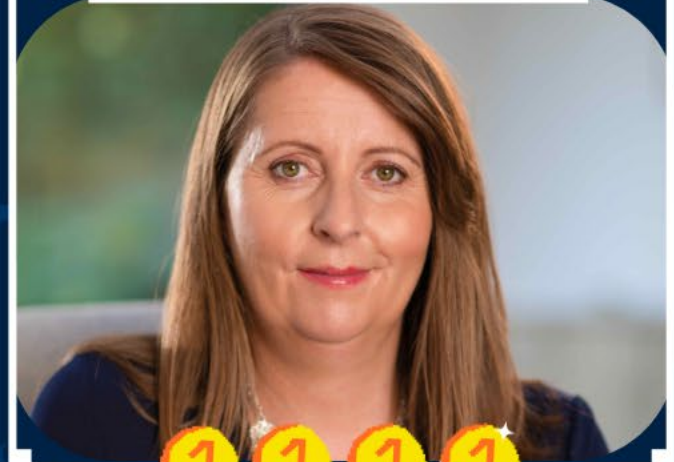
ROLE

CHIEF EXECUTIVE

SPECIAL SKILL

WAVEMAKING

JACKIE LEIPER



COMPANY

SCOTTISH WIDOWS

ROLE

MANAGING DIRECTOR

SPECIAL SKILL

UNSHAKEABLE

#LANGCATLIVE

HOME GAME 3

GAME PAUSED

LEVEL 3

HOME GAME 3

TECH CHANGE:
THE PLANNER
PERSPECTIVE



NATALIE HOLT

COMPANY
THE LANG CAT

ROLE
CONTENT EDITOR

SPECIAL SKILL
ULTRACONTENT



JENNY ELLIS

COMPANY
WELLINGTON WEALTH

ROLE
DIRECTOR

SPECIAL SKILL
AQUAFORMING



NICOLA ELLIS

COMPANY
WELLINGTON WEALTH

ROLE
DIRECTOR

SPECIAL SKILL
CLAIRVOYANCE



SAM TATE

COMPANY

NEW WORLD

ROLE

CO-FOUNDER & CEO

SPECIAL SKILL

TERRAFORMING



ANDY REYNOLDS

COMPANY

PURPOSE FINANCIAL PLANNING

ROLE

CO-FOUNDER & CEO

SPECIAL SKILL

HYPERFOCUS

LEVEL 4

HOME GAME 2

HELLO?
WE'RE RUNNING
A BUSINESS
HERE



NATALIE HOLT

COMPANY
THE LANG CAT

ROLE
CONTENT EDITOR

SPECIAL SKILL
ULTRACONTENT



JENNY ELLIS

COMPANY
WELLINGTON WEALTH

ROLE
DIRECTOR

SPECIAL SKILL
AQUAFORMING



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WELLINGTON WEALTH

ROLE
DIRECTOR

SPECIAL SKILL
CLAIRVOYANCE



1111
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TERRAFORMING



1111
ANDY REYNOLDS

COMPANY

PURPOSE FINANCIAL PLANNING

ROLE

CO-FOUNDER & CEO

SPECIAL SKILL

HYPERFOCUS

**CHRIS
BAIGENT-REED**



COMPANY

JIGSAW TREE

ROLE

FOUNDER

SPECIAL SKILL

TRUTHBOMBS

**ANNETTE
KINSMAN**



COMPANY

SUCCESSION

ROLE

HEAD OF PLATFORM SERVICES

SPECIAL SKILL

WEAPONPROOF

NICKY SEVEL



COMPANY

WOVEN ADVICE

ROLE

FOUNDER

SPECIAL SKILL

DATAMAGIC

LEVEL 4

HOME GAME 2

SAVE OUR PROGRESS

NATALIE HOLT



COMPANY

THE LANG CAT

ROLE

CONTENT EDITOR

SPECIAL SKILL

ULTRACONTENT

TOM HAM



COMPANY

CALTON WEALTH

ROLE

FOUNDER & DIRECTOR

SPECIAL SKILL

GILETS



BUILD YOUR INVENTORY

WHERE DO YOU GET HELP ON
DECIDING THE BEST TECH FOR
YOUR BUSINESS?



BUILD YOUR INVENTORY

- A. MY TEAM
- B. EXTERNAL COMPLIANCE OR SUPPORT SERVICE
- C. RATINGS
- D. PEER REVIEW
- E. DUE DILIGENCE SOFTWARE
- F. SPECIALIST TECHNOLOGY CONSULTANCY
- G. I DON'T NEED NO HELP



RESULT



CHOOSE YOUR QUEST

LET'S IMAGINE YOU HAVE A LOOMING
DECISION TO MAKE ON A MAJOR PART OF
YOUR TECH NEXT WEEK.

WOULD YOU...



CHOOSE YOUR QUEST

A. GO ROGUE WITH A START-UP/DISRUPTOR

B. STAY ON THE PATH WITH AN ESTABLISHED PLAYER

C. BUILD OR BESPOKE IT YOURSELF



RESULT



DODGE THE BULLETS

WHICH IS HARDER: CHOOSING TECH AND
GETTING IT TO WORK, OR HAVING THE RIGHT
PEOPLE TO GET THE MOST OUT OF IT?



DODGE THE BULLETS

A. TECH

B. PEOPLE

RESULT



REPLAY A LEVEL

THINK BACK TO THE NEMESIS YOU PICKED AT THE
START OF THE DAY. HOW PREPARED ARE YOU TO
TAKE ON THAT WEAK POINT IN YOUR TECH NOW?



REPLAY A LEVEL

A. BRING IT ON

B. MORE SKILL POINTS NEEDED

C. THE ROAD AHEAD IS STILL SCARY

The background features a vertical gradient from dark blue at the top to a vibrant purple at the bottom. Numerous small, light blue and white stars are scattered across the entire surface, creating a starry night sky effect.

RESULT



SAVE OUR PROGRESS

WHICH PLAYERS SHOULD BE ALLOWED
TO STAY IN THE GAME? WHICH AREA
HAS PROGRESS WORTH SAVING?



SAVE OUR PROGRESS

A. PLATFORMS

B. RETIREMENT INCOME PROVIDERS

C. PRACTICE MANAGEMENT SYSTEMS

D. INVESTMENT MANAGEMENT SYSTEMS

E. RISK MANAGEMENT TOOLS

F. CASHFLOW TOOLS



RESULT



SAVE YOUR PROGRESS

NOW YOU'RE A MORE EXPERIENCED
PLAYER, WHERE WILL PROGRESS COME
FROM FOR YOU?



SAVE YOUR PROGRESS

- A. MAKING THE MOST OF OUR EXISTING TECH
- B. BUILDING OUR OWN STUFF
- C. GETTING CLEARER ON WHAT WE WANT OUR TECH TO DO
- D. PICKING KIT FROM OUTSIDE THE INDUSTRY
- E. UPSKILLING OUR TEAM

The background features a vertical gradient from dark blue at the top to a vibrant purple at the bottom. Scattered throughout this gradient are numerous small, light blue and white star-like shapes, some of which are slightly blurred, creating a sense of depth and a starry night sky effect.

RESULT

NATALIE HOLT



COMPANY

THE LANG CAT

ROLE

CONTENT EDITOR

SPECIAL SKILL

ULTRACONTENT

TOM HAM



COMPANY

CALTON WEALTH

ROLE

FOUNDER & DIRECTOR

SPECIAL SKILL

GILETS

YOU'RE NEARLY
THERE

Mark Polson player card



**BONUS
LEVEL**

QR code

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HOME GAME 1

abrdn

Criterion

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Parmenion

Quilter

SCOTTISH WIDOWS