



Introductions, PKF Partners Catherine Heyes & John Needham



Surgery 1: Capital raising – primarily focused on EIS/SEI

The Enterprise Investment Scheme/Seed Enterprise Investment Scheme (EIS/SEIS) can help with your company’s fundraising by giving investors income tax relief of as much as 50% of the cost of the shares that they acquire. Chris Riley will explain how you can boost your equity raising efforts by taking advantage of EIS and SEIS.

Chris Riley, Head of Tax
@PKF_LJN_Tax
www.pkf-littlejohn.com

Surgery 2: Getting the most from HMRC (incl. R&D, VAT structuring and reliefs)

Numerous tax reliefs are potentially available to Insurtech businesses - but how many of them do you know about? Catherine Heyes, Nick McChesney and Shona Baker will introduce some of the tax breaks that could help your company, including research and development relief, and outline how to optimise your VAT payments.

Catherine Heyes, Partner
Nick McChesney, Partner
Shona Barker, Senior Manager

Surgery 3: Growing up in a regulated environment – overview, risk transfer, capital requirements and client money

Staying on top of the ever-changing regulatory environment is a major undertaking - and it's particularly challenging for businesses that are unused to regulatory supervision and for those where management attention is focused primarily on growth. John Needham and Bethanie Crayston will look at how to remain compliant with the myriad regulations, without undermining the entrepreneurial culture that will be key to your success.

John Needham, Partner
Bethanie Crayston, Manager
@PKF_Littlejohn
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Surgery 4: How to Use Social Media to Influence Key Accounts and Showcase Your Team’s Expertise

Passle platform and process is solely focused on helping clients transform their selling effectiveness by leveraging the expertise of their team in a way buyer’s want to be engaged and influenced. Over the last four years they have developed a platform and process that is used by organisations like Deloitte, Oracle, Fujitsu, NTT Group, Charles Taylor, CMS, Dentons and others to achieve their business goals.

David Kirk, Senior VP
@passle
www.passle.net



Surgery 5: Brexit - Will it effect me and if so how?

Insurance businesses are working through a variety of issues arising from the UK’s withdrawal from the EU. Market access, outsourcing, data transfer, people and economic impacts are common themes. Paul Merrey and Matt Francis have supported a range of insurance businesses assess their options through both strategic and regulatory lenses. Both Paul and Matt are interested in the opportunities and challenges that Brexit presents for emerging and established business models. BIBA Brexit committee members

Paul Merrey, Partner
Matthew Francis, Director at Regulatory practice
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Surgery 6: For Prospective Entrepreneurs - How do I convert my idea into a business?

The InsurTech Gateway has an expert team, well drilled in spotting a good InsurTech business idea when they see one, if it has legs, these are the guys to make it run. The Gateway is the fastest place to build and launch your InsurTech idea. The Gateway allows founders to retain more equity in their business by reducing the time required to get authorisation, capacity and capital. Getting ideas into market, with real customers, in a matter of months, cutting the cost of entry from £1m to £200-300k.

Stephen Brittain, Director
Charlie Evans, Head of Deal Flow
@Ideas_Gateway
insurtechgateway.com



Surgery 7: Product Design for Corporates - how to get a product to market in 60 days

Many new product launches in insurance take too long, and are based on guesswork about the product-market fit. Ninety Consulting are insurance-specialist innovation practitioners that innovate for the global insurance sector and help it become better at innovation. Their 123 Framework® is a structured model for insurance proposition development, customer evaluation and market pilot launch. It’s a methodology being used by Zurich, Hiscox, Allianz, Direct Line and Bupa, amongst others, with multi-award-winning results. Kathy Walker is an experienced innovation consultant leading client engagements with Ninety Consulting. She’ll be on hand to share tips and techniques from Ninety’s playbook, and to point you to various free proposition development tools on offer from Ninety. Book in to pick up a free copy of Ninety’s Insurance Innovation Toolkit and insurance-specific version of the Business Model Canvas.

Kathy Walker, Innovation Lead
@NinetyTweets
ninety.com

	<p>Surgery 8: Raising Investment in the US James leads the firm's inward investment team and set up the firm's San Francisco office in 2014. He assists many companies with their fundraising needs both in the UK and the US.</p>	<p>James Klein, Corporate Partner, Head of Digital Business Group @Penningtonslaw www.penningtons.co.uk</p>
<p>FCA</p>	<p>Surgery 9: Everything you need to know about the FCA Sandbox and interaction with the regulator early stage Stephen has worked in the FCA's regulatory sandbox since the launch of its first cohort in 2016. Stephen has worked directly with a large number of companies testing in the sandbox across a range of different sectors, including significant experience with InsurTech firms.</p>	<p>Stephen Moore, Sr Associate; Regulatory Sandbox team, Innovate Department @TheFCA www.fca.org.uk</p>
<p>Capital Law</p>	<p>Surgery 10: Intellectual Property - have I got IP I can protect it, and if so how? Nicola McNeely is Partner and Head of Technology at Capital Law. She's worked for over 20 years with start up and scale up businesses, advising them on how to protect their IP (including branding), IT contracts (including cloud infrastructure projects), software (including Apps, SaaS, PaaS, websites), commercial contracts and fundraising. She has experience in Blockchain, having worked with The Royal Mint on the creation of the first fractionalised gold investment product on the blockchain, RMG, and numerous other businesses</p>	<p>Nicola McNeely & Rhys Oakley IP & Commercial Lawyers @capitallawLtd Li: capitallawLtd www.capital-law.co.uk</p>
	<p>Surgery 11: Recruitment - how can I find the right people without paying extortionate search fees? Gareth has spent two decades in the insurance sector, with the last 13 years spent sourcing talent at every level for organisations of all sizes and from the world over. He will debunk recruitment myths and give you a clearer understanding of what motivates your recruitment partners, to help you get the most from your relationships with them</p>	<p>Gareth Eggle, Founder & Principal @GarethEggle Li: GarethEggle</p>
	<p>Surgery 12: MGA - Matching Ideas to the Right Insurance Solution John is responsible for the onboarding of new business from a digital perspective and spend a considerable time with new partners constructing their insurance proposition. They look at the best way in which to construct the business they are considering to underwrite as well as what type of wording would suit the business whether they want a guarantee or what type of insurance cover they may need to have included to maximise the customers response to the product. This all has to be balanced between a customer journey that attunes to where the partner wants to be and the regulatory demands that we as an insurer faces.</p>	<p>John Pyall, Head of the MGA Cockpit – Great Lakes Insurance SE munichre.com/digital-partners @MunichRe</p>
<p>NINETY CONSULTING</p>	<p>Surgery 13: Accelerators, labs and incubators: when to build one and how to avoid common pitfalls Ninety Consulting are insurance-specialist innovation practitioners. They innovate for the global insurance sector and help it become better at innovation. Earlier this year, Ninety helped Zurich build their Innovation Foundry, currently shortlisted for 3 separate major awards. Dan White is Senior Partner at Ninety Consulting, where he is responsible for their work in insurance innovation, and contributes to their investment strategy in the InsurTech sector. Book in to learn about what's working and not, to chat through Ninety's Future Labs principles, and to get an outline of their Lab-in-a-Box methodology.</p>	<p>Dan White, Senior Partner @DanWhiteNinety ninety.com</p>
<p>TANCREDD STRIX</p>	<p>Surgery 14: Setting up a business properly - the right strategy and early-stage advice to avoid future problems Tancred Strix offers practical business advice based on many years' experience of helping start-up businesses to grow. They help with business planning, marketing, sourcing the correct financial and legal advice at the right price, and laying the foundations for sound financial management and sustainable growth - much of it is done pro bono. John Lojek is an international leader with a strong track record of driving change and delivering results in large corporates and startups, focusing on relentlessly growing and improving organizations. Jenny Pierce works with IP rich companies, ranging from startups to multinationals, helping to formulate and implement policies in the long term, getting the best from their most important assets.</p>	<p>Gina Jennings, Director John Lojek, Management consultant Jenny Pierce, an IP & technology law expert tancredstrix.com</p>
<p>capitalise</p>	<p>Surgery 15: Early stage loans and the use of Online lending platforms Capitalise uses a little funding magic to identify the best financing options available for your business. Capitalise is supported by both the Microsoft Accelerator and Microsoft Growth program and was recently identified by NESTA as one of the top ten Fintechs that could shape the future of small business banking. Capitalise believes in fairer finance and treatment of businesses and their owners and is authorised and regulated by the FCA.</p>	<p>Michael Cass, Senior Partnerships Manager @Capitalisers Capitalise.com</p>

Want to learn more? www.instech.london / hello@instech.london / bit.ly/InsTechiTunes