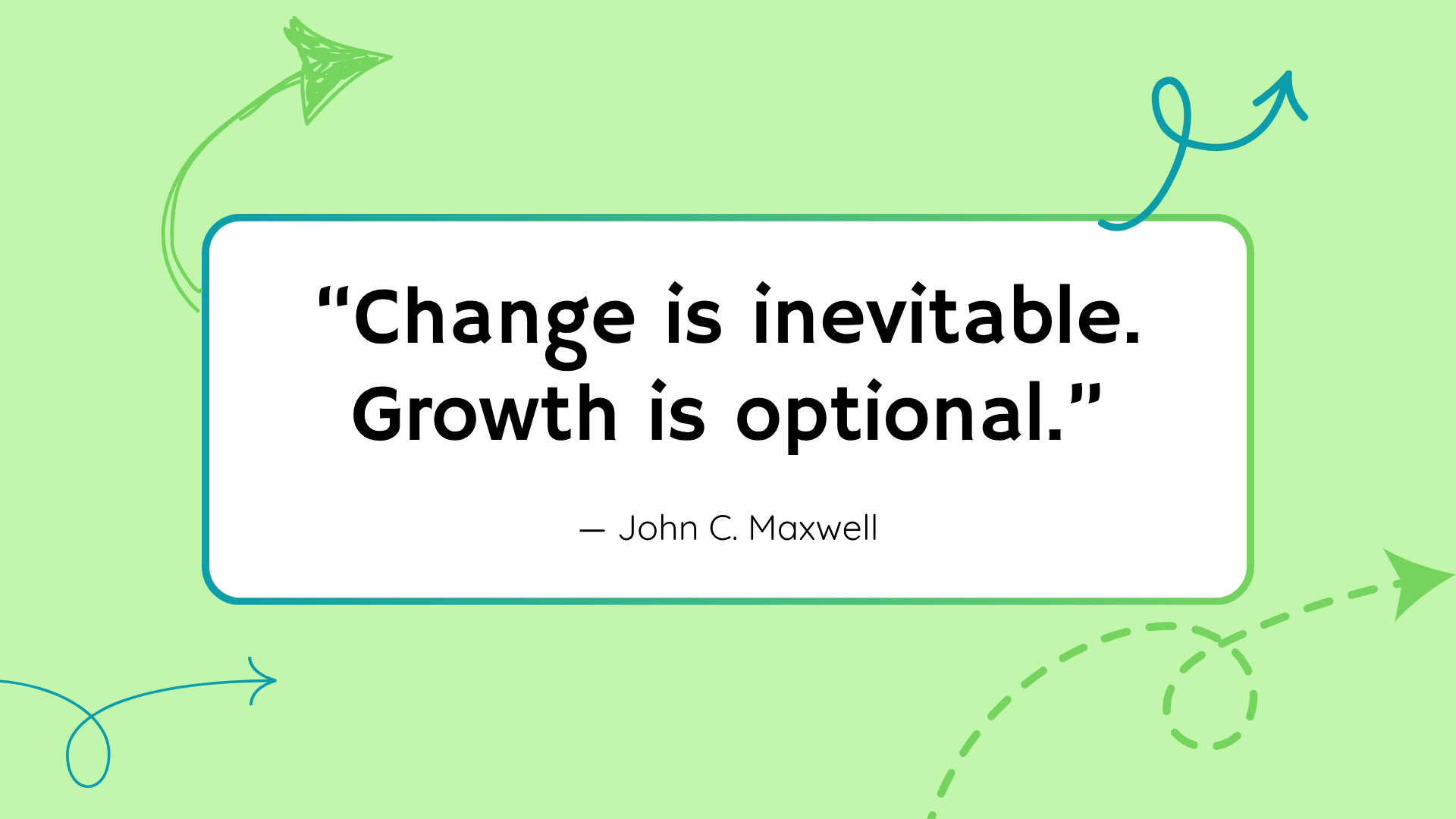


**Your career,
your choice:
designing
your
professional
future**



The background is a solid light green. There are several decorative elements: a green arrow pointing up and to the right from the top left; a blue arrow pointing up and to the right from the top right; a blue arrow pointing right from the bottom left; and a dashed green arrow pointing right from the bottom right, with a small dashed green circle near its tail.

**“Change is inevitable.
Growth is optional.”**

— John C. Maxwell



Overview

- Why we're here: AI is shifting the skills landscape
- What we'll do: Reflect, map, and design your career with AI's advancement in mind
- How: Guided activities using Ikigai-inspired tools

Learning Outcomes:

Clarity on the skills you love, those AI could take on, and your unique human edge

A personal career compass (via the worksheet)

One concrete next step for adapting or investing in yourself.





Four Perspectives

Four perspectives



Four perspectives



Ben Wright, Chief Innovation Officer, Melo

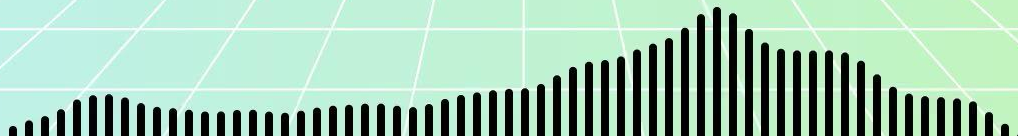
So, uh, can I be really controversial?

Four perspectives

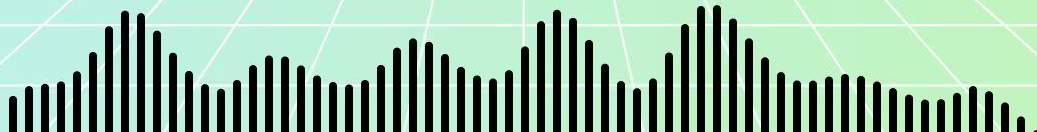


Aram Kupelian: Paraplanning Director, Holden & Partners

**I think it's our more
meticulous team members
who are perhaps a little
hesitant,**



Four perspectives



Example

Quadrants that clearly split out the tasks you enjoy and what only you can do

XYZ a reflection of where you want to be after taking AI into account

What I Love

- Digging into technical detail and problem-solving complex scenarios
- Turning adviser shorthand into a personalised, polished plan for clients
- Researching tax wrappers, pensions, trusts, or investment options

What I Dislike

- Repetitive admin (copying across data, formatting, cross-checking numbers)
- Chasing missing information
- Re-doing reports after last-minute adviser changes

What AI Can Do

- Auto-formatting reports to company templates
- Generating first-draft suitability report wording from fact-finds
- Spotting inconsistencies across data (dates of birth, NI numbers, policy details)

What Only I Can Do

- Professional judgement on technical recommendations
- Translating adviser shorthand into a client-relevant story
- Spotting subtle inconsistencies between adviser intent and technical reality

- X:** I wanted to become a Chartered Paraplanner and eventually, team lead through technical development.
- Y:** AI may take over much of the technical drafting and calculations, so just being a technical expert might not be enough.
- Z:** I now see myself as someone who combines technical oversight with mentoring others and adding empathy to client documents.

Action: Focus on strengthening one uniquely human skill I enjoy.

Timeframe: 6 months

Intersections that indicate where you may need to adapt, where you'll find relief and where to develop

Optional but recommended

An action and timeframe to take next in your career



What I Love



What I Dislike



|

What AI
Could Do



What Only I
Could Do

“Care to share?”



Intersections

1. What I Love × What AI Might Threaten
2. What I Dislike × What AI Could Do
3. What I Love × What Only I Can Bring

What I Love

- Digging into technical detail and problem-solving complex scenarios
- Turning adviser shorthand into a personalised, polished plan for clients
- Researching tax wrappers, pensions, trusts, or investment options

What I Dislike

- Repetitive admin (copying across data, formatting, cross-checking numbers)
- Chasing missing information
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What AI Can Do

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What Only I Can Do

- Professional judgement on technical recommendations
- Translating adviser shorthand into a client-relevant story
- Spotting subtle inconsistencies between adviser intent and technical reality

4 mins |

What I Love
×
What AI Could
Do

4 mins |

What I Dislike
×
What AI Could
Do

4 mins

|

What I Love

×

What Only I Can
Bring

“Care to share?”



XYZ

**X = Where I wanted to be
before this workshop**

**Y = How I think AI could
impact my career**

**Z = Where I want to be after
adapting for AI**

- X:** I wanted to become a Chartered Paraplanner and eventually, team lead through technical development.
- Y:** AI may take over much of the technical drafting and calculations, so just being a technical expert might not be enough.
- Z:** I now see myself as someone who combines technical oversight with mentoring others and communicating empathy through client documents.

4 mins |

XYZ

4 mins |

Action
&
Timeframe

“Care to share?”



Coming soon...



**Your career is
yours to design.**

Thank You