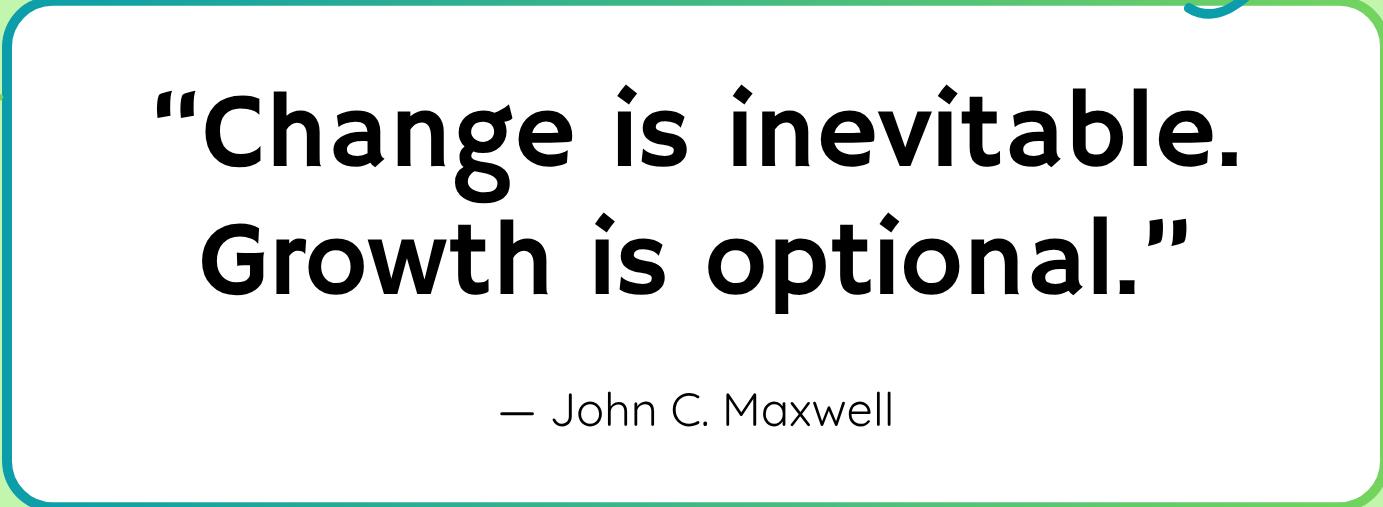


Your career,  
your choice:  
designing  
your  
professional  
future





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

— John C. Maxwell



# Overview

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- 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?**

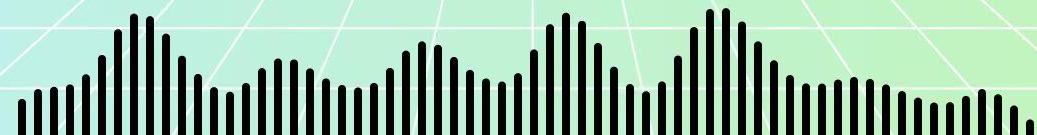
## Four perspectives



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 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 I Dislike

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

## 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 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 I Dislike

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

## 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  
x  
What AI Could  
Do

4 mins |

What I Dislike  
x  
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**