Agenda
Birmingham Accumulation & Investment Roadshow Q3 2017

Venue:
Ramada Sutton Coldfield, Penns Lake Rd, Sutton Coldfield, Birmingham , B76 1LH

Date:
Tuesday 05 Sep 2017
In association with our Partners in Professionalism:

octopus investments
A brighter way

Legal & General

TIME

INVESTMENTS

Cazenove Capital

aic
The Association of Investment Companies

tavistock
INVESTMENTS PLC

iShares
by BLACKROCK

Russell Investments

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5-Sep-2017

08:45 - 09:30  Registration

09:30 - 09:40  Welcome and opening by Chair

09:40 - 10:15  Global economics and asset allocation

- Understand how external factors are affecting the global economy
- Understand current valuation in historical context
- Market outlook for the next twelve months

Caspar Rock, Cazenove Capital

10:15 - 10:50  Navigating risk, managing portfolios for when the tide turns
Understand the key factors to look out for when setting an overall risk outlook
Understand the key risks that are likely to impact portfolio construction
Know how to position client portfolios to deal with a potential downturn

Hugh MacTruong, Legal & General Investment Management

10:50 - 11:10  
Tea & Coffee

11:10 - 11:45  
Alternative finance and peer-to-peer lending

- What’s out there and why has it developed
- The changing regulatory landscape and what it means for advisers
- Peer-to-peer lending: myths, milestones and missed opportunities
- Advising on peer-to-peer lending: key consideration

Caroline Flagg, Octopus

11:45 - 12:20  
Searching for Income

- Demonstrate the benefits of long income property compared to traditional property investments
- Describe how long term security of return can be achieved in long income asset class
- Understand the call for long income when planning for and in retirement
- Appreciate opportunities where inheritance tax planning can complement planning for income

Ian Robson, TIME Investments

12:20 - 12:55  
‘Silver hair’ market seeks ‘Goldilocks scenario’

- An understanding of the issues facing clients in the decumulation phase
- An understanding of sequential risk and its impact on client portfolios
Strategies within portfolios to mitigate these risks
A strategy to identify transparent and targeted investment solutions

Mark Hayhoe, Russell Investments

12:55 - 13:35  Lunch

13:35 - 14:10  Looking beyond active vs passive to help you navigate the perfect storm

• To understand the statistics of active management and their impact on client returns
• How to get the statistics to work in your favour
• Understand the perfect storm approaching bond and currency markets and its impact on client portfolios
• Action to take to navigate through this perfect storm

Steven McGregor, Tavistock Investments Plc, Unit 1

14:10 - 14:45  Illiquid assets: are you getting enough?

• Explain the concept of the liquidity premium and the evidence for such an effect
• Identify the diversification benefits, income advantages and potential risks of investing in illiquid assets
• Understand how illiquid assets may be accessed through quoted investment companies (investment trusts) and the associated benefits and risks
• Know the key points to look for when researching and selecting investments whose underlying assets are illiquid

Nick Britton, The Association of Investment Companies

14:45 - 14:55  Summary and close by Chair
The content in each session has been carefully selected and can be considered for both structured and unstructured CPD hours, depending how this activity addressed each individual's personal development needs.

**Structured CPD** is the undertaking of any formal learning activity designed to meet a specific learning outcome (this is what an individual is expected to know, understand or do as a result of his or her learning).

**Unstructured CPD** is any activity an individual considers has met a learning outcome, but which may not have been specifically designed to meet their development needs.

Attendance at this event can be included as part of your CPD requirements should you consider it relevant to your professional development needs.