



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Birmingham Regional Conference 2 2022

Venue:

Hilton Birmingham Metropole, National Exhibition Centre, Pendigo Way,
Marston Green, Birmingham , B40 1PP

Date:

Wednesday 11 May 2022



Birmingham Regional Conference 2 2022

In association with our Partners in Professionalism:



11-May-2022

08:45 - 09:30 Registration

09:30 - 09:40 Chair Introduction

09:40 - 10:15 When exactly is the right time to gift?

Learning objectives:

By the end of the session you will be able to:

- Identify the different options for wealth transfer and wealth creation
- Explain the key issues for reviewing older clients in drawdown
- Demonstrate the personal taxation implications for gifting

Andrew Nash, Prudential

10:15 - 10:50 The Monopoly of markets - a game of chance or strategy?

Learning objectives:

- Understand the impact of inflation and central banks' monetary policies on financial markets, and how to support clients through this.
- Assess how portfolios should be built in light of this, with a focus on how to protect capital and identify opportunities.
- Explore future investment trends and assess the impact they may have going forward.

Elliot Date, Fidelity International

10:50 - 10:55 Professional Qualifications Officer

10:55 - 11:15 Coffee break

11:15 - 11:20 Chartered Champion

11:20 - 11:55 Complete client conversations - confidently discuss responsible and sustainable investment

Learning objectives:

- What is responsible and sustainable investment and why is it important?
- What ESG and Active Ownership mean for investment management?
- How responsible investment creates advice opportunities and benefits for your clients
- How to conduct a conversation by asking the right questions

- How you can avoid greenwashing and provide valuable insights to clients beyond investment returns.

Liam Setna, Quilter

11:55 - 12:30 Future proofing your CIP

According to the research, the benefits of the insourcing/outsourcing approach cited by advisers include:

- Access to professional DIMs
- Improved client outcomes
- Time saving
- Business risk reduction
- Opportunities to save cost, including on PI
- Reduced governance burdens
- Support for brand-building and execution

After the presentation, advisers will have the opportunity to acquire a copy of the full Copia research report, discuss it with the Copia team, or book a meeting to benchmark their organisation against the findings and discuss the options open to them to improve their operational efficiency and profitability.

Learning Objectives:

- Understand the role centralised investment propositions (CIP) play in generating positive outcomes for advice firms and their clients.
- Review the new Copia research to assess good practice learnings from other advice firms, and to understand how long advice firms typically spend operating their CIP
- Look at how advice firms can future proof their CIP to ensure regulatory compliance, operational efficiency, and the optimum client outcomes

Robert Vaudry, Copia Capital

12:30 - 12:35 Education Outreach Ambassador

12:35 - 13:15 **Lunch**

13:15 - 13:20 **Membership Officer**

13:20 - 13:55 **Pension Hot Topics**

Learning objectives

- Understand how pension contributions can help reduce tax bills
- Describe how pension contributions can help restore lost pension allowances
- Explain the legislative changes affecting state pension provision

Justin Corliss, Royal London

13:55 - 14:00 **Chair's close**



Personal Finance Society

Standards. Professionalism. Trust.



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.

