



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Birmingham Regional Conference
Q4 2019

Venue:

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

Date:

Wednesday 16 Oct 2019



In association with our Partners in Professionalism:

Cornelian
ASSET MANAGERS

DYNAMIC
PLANNER

JUST.
RETHINK RETIREMENT


PRUDENTIAL

 **moneyinfo**

SCOTTISH WIDOWS

16-Oct-2019

08:45 - 09:30 Delegate Registration

09:30 - 09:40 Chair's welcome and AGM
Michelle Mahiques-Pearce,

09:40 - 10:15 Pulling all the levers – from the normal to the niche

- Recognise key risk indicators, and the ways in which they can be interpreted
- Learn the different ways to dynamically manage risk
- Understand the benefits of a flexible approach to portfolio risk positioning

Andrew Naylor, Cornelian Asset Managers (North West and West Midlands)

10:15 - 10:50 Understanding – Making complex things simple, not the other way around

By the end of this session you will understand:

- The regulatory requirements for client understanding
- The techniques and tools available to aid understanding
- The behaviour psychological theories that apply
- The limitations of unit price returns and measurements

Chris Jones, Dynamic Planner

10:50 - 10:55 Membership Officer

10:55 - 11:20 Morning break

11:20 - 11:25 Chartered Champion

Alexandra Vind, Chapter House Wealth Management

11:25 - 12:00 Retirement Income – Past, Present and Future

By attending this session, advisers will be able to:

- Discuss the fundamental shift in risks relating to the retirement market
- Understand the key elements relating to guaranteed income as published in PS19/01
- Recognise the importance of accurate underwriting information
- Discuss how to achieve the balance between flexibility and a guaranteed income for life

Jeremy Martin, Canada Life Assurance Co

12:00 - 12:35 Allowance...what allowance?

- An overview of the various annual allowances – how and when they are triggered
- How these annual allowances work alongside each other
- How to calculate any charge that may apply

Andrew Nash, Prudential

12:35 - 13:10 How to introduce mobile communications into your advice process

This session will help you to;

- Understand how clients are engaging with digital technology
- The problems you can solve for them to ensure great adoption
- The operational efficiencies this delivers

Sim Sangha, moneyinfo limited

13:10 - 13:15 Professional Qualifications Officer

13:15 - 13:55 Lunch

13:55 - 14:30 Protection Session

Adam Robertson, Scottish Widows

14:30 - 15:30 Retirement Case Study

In this interactive session, we will be covering the following:

- Building rapport with new clients
- Getting beyond the factfind - clarifying the clients' aims and objectives and identifying issues to consider when advising them
- A cunning plan - putting in place a decumulation strategy that achieves their objectives

Paul Duckworth, Chartered Financial Planner at Paul Duckworth IFA

15:30 - 15:35 Chair's Close



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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.

