



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Bristol & Cheltenham Regional Conference 2 2022

Venue:

Cheltenham Racecourse, Cheltenham Racecourse, Cheltenham , GL50 4SH

Date:

Wednesday 25 May 2022



Bristol & Cheltenham Regional Conference 2 2022

In association with our Partners in Professionalism:



25-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

Kirsty Anderson, M&G Plc

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

Speaker TBC, Fidelity
James Bird,

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

Speaker TBC, Quilters
Tom Hawkins, Quilter

11:55 - 12:30 Future proofing your CIP

Speaker TBC, Copia Capital
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 **Pensions as a tax reducer & state pensions**

Speaker TBC, Royal London
Justin Corliss, Royal London

13:55 - 14:00 **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.

