



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Exeter & North Devon Regional
Conference Q2 2020

Venue:

Holiday Inn Taunton, Deane Gate Ave, Taunton, TA1 2UA

Date:

Wednesday 03 Jun 2020



In association with our Partners in Professionalism:

3-Jun-2020

08:45 - 09:30 Delegate Registration

09:30 - 09:40 Chair's Welcome

09:40 - 10:15 More of the same?

- Understand the outlook for global growth and inflation in 2020 and beyond
- Consider some of the key political challenges facing investors
- Outline the key fundamental factors likely to determine asset class performance

Invesco

10:15 - 10:50 Flexi-access drawdown – The good, the bad, and the ugly

- Be able to identify the risk factors associated with income drawdown
- Understand the Regulator's main concerns with income drawdown
- Understand how you can review your client's drawdown plan in a compliant and cost-effective way

Royal London

10:50 - 10:55 Professional Qualifications Officer

10:55 - 11:15 Chair's Session 1: Member's choice

11:15 - 11:35 Morning Break

11:35 - 11:40 Chartered Champion

11:40 - 12:15 Beyond the Next 10 years: Inescapable Opportunities in Sustainable Investing

- Understand how disruption is thematic and inescapable
- Focus on urbanisation and climate change disruption through food, fashion and travel
- How to integrate sustainable themes into your clients' portfolios

Schroders

12:15 - 12:50 Planning for Better Outcomes

- Breaking income and retirement planning away from the growth-oriented risk profile
- Building better, outcome based strategic asset allocations for growth and income need
- How to seamlessly align investment solutions with the advice process, to tackle the suitability challenge
- Avoiding system proliferation, creating more efficiency in the advice process

SimplyBiz Group

12:50 - 13:25 The 2020 Budget - What it means to financial advisers and their clients

- An understanding of the more important and relevant tax proposals in the 2020 Budget
- How these proposals/changes might impact on clients of financial advisers
- What planning action such clients/advisers should consider
- Any important planning opportunities that advisers can communicate to their clients

John Woolley, Technical Connection

13:25 - 13:30 Education Outreach Ambassador

- 13:30 - 13:35** **Membership Officer**
- 13:35 - 14:15** **Lunch**
- 14:15 - 14:35** **Chair's Session 2: Dear CEO Letter**
- 14:35 - 15:20** **The Big Financial Planning Quiz - Who Wants to Advise a Millionaire**
- 15:20 - 15:55** **Protection Session**
- 15:55 - 16:00** **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.

