



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Exeter & North Devon Specialist
Regional Roadshow | Retirement &
Later Life | H1 2022

Venue:

Somerset County Cricket Club, The Cooper Associates County Ground,
Taunton , TA1 1JT

Date:

Thursday 24 Mar 2022



**Exeter & North Devon Specialist Regional Roadshow | Retirement & Later
Life | H1 2022**

In association with our Partners in Professionalism:



INGENIOUS



24-Mar-2022

08:45 - 09:30 Registration

09:30 - 09:40 Chair's Introduction

09:40 - 10:15 Divorce in later life – supporting your clients through difficult times

Learning objectives

- Appreciate the growth and nature of divorce in later life and the holistic advice opportunities this presents.
- Review the scope of advice in respect of pensions and property assets when developing a degree of specialisation in this area.
- Review some of the technical and market support available to help develop your knowledge and expertise.

Cecilia Furner, DipPFS, Legal & General Investment Management

10:15 - 10:50 Diversification and alternative assets

Learning objectives

- Understand the important role diversification can play in clients' portfolios during retirement and in later life
- Identify the positive impact characteristics of some alternative assets
- Articulate why alternative assets can add value at different life stages

Victoria Barber, TIME Investments

10:50 - 11:10 Morning Break

11:10 - 11:45 Government care cap proposal – the realities

Learning outcomes:

- Understand the need and importance of regulated advice in the care market
- Consider the workings of the cap and review other aspects of the proposals
- Summarise the different ways that care might be funded

Graham Duffy, Just.

11:45 - 12:20 Playing the game of later life

In this session, we'll discuss

- The forces that can influence wealth preservation, both positively and negatively

- The current economic conditions and how challenges like volatility and inflation are changing the rules of the game
- Strategies to help your clients play this most important game and come out on top

Matt Dickens, The Ingenious Group

12:20 - 13:00 Lunch

13:00 - 13:35 Inheritance Tax & The Covid Opportunity

Key points include:

- UK SME's & Business Relief
- IHT & the Covid Opportunity
- Business Relief Key Drivers
- IHT Planning: Client Conversations
- Business Relief Planning Ideas

Mark Brownridge, Sarah Hendy, BlackFinch Investments

13:35 - 14:10 Supporting Bereaved Clients

Learning Objectives

- Understanding the nature of bereavement and the needs of bereaved people
- Appreciate the overall work of the National Bereavement Service
- Assess the nature of support available to clients of financial advice firms from the National Bereavement service and other related organisations

Anne Wadey, National Bereavement Service

14:10 - 14:40 Lasting Powers of Attorney - their role in supporting effective later life advice

Learning Objectives

- Review the various types of Power of Attorney and common mistakes when people effect Lasting Powers of Attorney
- Determine how such Powers interact with key aspects of later life advice
- Assess recent proposals from the Ministry of Justice in respect of Lasting Powers of Attorney and the Small Payments scheme

Tony Miles MBA, DipPFS, My Care Consultant

14:40 - 14:45 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.

