



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Herts, Middlesex and Bedfordshire Summer Conference

Venue:

Hilton Watford London , Elton Way, Watford , WD25 8HA

Date:

Wednesday 10 May 2023



Herts, Middlesex and Bedfordshire Summer Conference

In association with our Partners in Professionalism:

Partner Logo

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10-May-2023

08:45 - 09:30 Registration

09:30 - 09:35 Chair Introduction

09:35 - 09:50 Word Cloud Activity

09:50 - 10:25 Is your CIP fit for duty?

Learning outcomes

- To reinforce understanding and awareness of consumer duty with a focus on investment management.
- To examine whether investment decisions previously made are still fit for new investors.
- To learn more about closed ended funds and how they can be incorporated with a model portfolio.

Our active range of model portfolios offers something different to the traditional basket of collective and so with the advent of consumer duty and the focus around propositions, pricing, value for money our content is both timely and interesting from a learning perspective.

Lucy Mitchell, Evelyn Partners

10:25 - 11:00 Property wealth in later life planning?

Learning objectives:

1. To learn more about the lifetime mortgages market, and why clients chose to release equity from their home
2. To find out more about how they could potentially benefit your clients
3. To learn how consumer duty is impacting the later life lending market?

Sanjay Gadhia, Standard Life Home Finance

11:00 - 11:05 Professional Qualifications Officer

11:05 - 11:25 Conversations Over Coffee

11:25 - 11:30 Chartered Champion

11:30 - 12:05 Topical tax planning for blended families

- To look at the opportunities for post-death inheritance tax planning
- To consider the general financial planning issues for people in second marriages with children from a first marriage
- To look at specific planning issues for such people in relation to investments, houses and pensions, and

- To consider the current landscape for lifetime inheritance tax planning that secures the financial position of a surviving spouse/partner

John Woolley, Trustee Support Services Ltd

12:05 - 12:40 Is your planning toolkit #readyforRishi?

Learning objectives:

- Understand the main budget changes and potential impact on your clients.
- Identify advice opportunities for clients effected by legislation and budget changes.
- Articulate solutions that can be used with clients these clients and the tangible impact these can have.
- Understand how you can satisfy your Consumer Duty obligations through tax planning conversation.

Steve Godfrey, Octopus Investments

12:40 - 12:45 Education Outreach Ambassador

12:45 - 13:00 Word Cloud Activity

13:00 - 13:05 Membership Officer

13:05 - 13:10 Chairs Close

13:10 - 13:40 Lunch and Learn



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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.

