

Personal
Finance
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Agenda

London II Regional Conference Q4
2019

Venue:

Cavendish America Square, 1 America Square, 17 Crosswall,
London , EC3N 2LB

Date:

Friday 13 Dec 2019





In association with our Partners in Professionalism:



13-Dec-2019

08:45 - 09:30 Delegate Registration

09:30 - 09:40 Chair's welcome

Robert Parker, Robert F Parker Financial Services

09:40 - 10:15 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



Tessa Lee, moneyinfo limited

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

Robert Wyatt, Barclays plc



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, Just

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

C, Prudential



12:35 - 13:10 Pulling all the levers – from the normal to the niche

- Recognise risk indicators, and the ways in which they can be interpreted
- Learn how to dynamically manage risk in multi asset portfolios
- Understand the benefits of this flexible approach

Chris Warren, Cornelian Asset Managers

13:10 - 13:15 Professional Qualifications Officer

Ian Hart, Unbiased Financial Group LLP

13:15 - 13:55 Lunch

13:55 - 14:30 Relevant Life Plan – Put Life cover on expenses

- List the main features of a relevant life plan and who is eligible to have one
- Explain the tax benefits of relevant life plans
- Identify potential clients to approach with information about relevant plans and business protection

Stuart Halliwell, Legal & General

14:30 - 15:30 Retirement Case Study

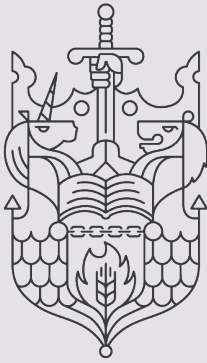


In this interactive session, we will be covering the following:

- 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

Neil Dickey, Professional Edge Ltd

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.

