



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Norfolk Regional Conference Q2
2019

Venue:

Dunston Hall Hotel, Ipswich Road, Norwich, NR14 8PQ

Date:

Tuesday 21 May 2019



In association with our Partners in Professionalism:



Schroders

SEVEN 
Investment Management



21-May-2019

08:45 - 09:30 **Delegate Registration**

09:30 - 09:40 **Chair's Introduction**
Hazel Bowen, Smith & Pinching Group Ltd

09:40 - 10:15 Around the World in 40 Minutes

By the end of this session you will:

- Be able to describe the opportunities that each economy offers an investor
- Understand where each of those economies sits in the economic cycle
- Consider the role that an unconstrained approach can play in a diversified portfolio.

Antony Teare,

10:15 - 10:50 Gaining an investment advantage – The psychology of value

This presentation is designed to aid your understanding of:

- The psychology of asking the right Value questions
- Why probabilities are so important to Value investors
- Why Value is an important theme in markets now.

Stuart Podmore, Schroders

10:50 - 10:55 Professional Qualifications Officer

David Barnes, Schroders Personal Wealth

10:55 - 11:20 Morning break

11:20 - 11:25 Chartered Champion

Harry Dunkinson, Smith & Pinching

11:25 - 12:00 Caging the Lizard – Helping clients to make better retirement decisions

- Understand the psychology behind human decision making
- Understand what can happen when we have too much information
- Understand the regulatory and client service need for a Centralised Retirement Proposition
- Understand the mathematical and scientific theory behind calculating optimal income for retirees in decumulation.

Andrew Donald, Seven Investment Management

12:00 - 12:35 Pension Death Benefits – Facts and Planning

By the end of this session you will be able to:

- Identify what death benefit choices are available
- Explain the taxation of death benefits
- Understand the impact of IHT on death benefits
- Describe spousal bypass trusts and how they work.

Ryan Medlock, Royal London

12:35 - 12:40 Membership Officer

Matthew Goddard, Smith & Pinching Group

12:40 - 13:20 Lunch

13:20 - 13:55 IHT Planning: Keeping it Simple

At the end of this session you will be able to:

- Explain the key recommendations made in the first IHT report by the OTS

- Consider the outlook for IHT planning in light of the OTS review
- Unravel some of the existing complexities in IHT legislation
- Identify and compare 'tried and tested' IHT solutions
- Appreciate how Business Relief can offer unique mitigation opportunities.

Siobhan Griffin, TIME Investments

13:55 - 14:35 Why protection should be a keystone of your clients' retirement plans

- Consider how protection plans could be used as an alternative and complimentary asset class.
- Explain the impact of recent changes affecting clients/landlords with residential/buy-to-let property.
- Understand how protection insurance can be used to protect investments on early death and various later life scenarios.
- Consider the planning points and opportunities to use protection plans for clients with property or approaching/in-retirement.

Richard Moodey, Zurich Intermediary Group

14:35 - 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.

