

Personal
Finance
Society
Standards. Professionalism. Trust

Agenda

Plymouth & Cornwall Regional Conference Q4 2019

Venue:

Lanhydrock Hotel and Golf Club, Lostwithiel Road, Bodmin , PL30
5AQ

Date:

Tuesday 10 Dec 2019





In association with our Partners in Professionalism:

Cornelian
ASSET MANAGERS

 DYNAMIC
PLANNER

JUST.
RETHINK RETIREMENT


PRUDENTIAL

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L&G


ZURICH

10-Dec-2019

08:45 - 09:30 Delegate Registration

09:30 - 09:40 Chair's welcome and AGM
Ged Dixon, Morlaix Ltd

09:40 - 10:15 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

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

Mike LeGassick, Manning and Company

10:55 - 11:20 Morning break

11:20 - 11:25 Chartered Champion

Rosie Falco, Evans Falco LLP

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

Karl Steadman , Just.

12:00 - 12:35 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

Lou Wallis, moneyinfo limited

12:35 - 12:40 Professional Qualifications Officer

12:40 - 13:20 Lunch

13:20 - 13:55 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.

Andy Woollon , Zurich

13:55 - 14:30 Income protection –time to revisit?

- Refresh your understanding of protection insurance in the market today



- Demonstrate how the benefits available from protection insurance can help clients needs
- Identify improvements you could make to your process to demonstrate compliance with the Insurance Distribution Directive

Richard Kateley, Legal & General

14:30 - 14:40 Coffee grab

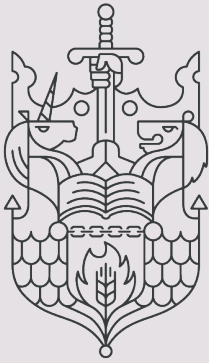
14:40 - 15:40 Retirement Case Study

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

15:40 - 15:45 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.

