



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Plymouth and Cornwall Autumn Conference

Venue:

Old Bakery Studios, Blewetts Wharf, Malpas Rd, Truro , TR1 1QH

Date:

Tuesday 03 Oct 2023



Plymouth and Cornwall Autumn Conference

In association with our Partners in Professionalism:



3-Oct-2023

08:45 - 09:30 Registration

09:30 - 09:35 Chair Introduction

09:35 - 09:50 Word Cloud Activity

1. Discuss topical issues with professional peers
2. Learn from hearing and sharing experiences with the wider group

09:50 - 10:25 Lost in the woods; Cabin fever or follow the breadcrumbs?

Learning objectives:

- Explain the recent macro events that reshaped the markets and caused disruption for investors.
- Describe how investors have been positioned in the past and the regions they should look to allocate to, going forward.
- Recognise the impact of future trends on our industry.

Elliot Date, Fidelity International

10:25 - 11:00 Future-proofing your client's legacy – IHT planning with protection

Learning objectives:

- Be aware of the current IHT market conditions and how protection fits into the IHT planning process
- Understand the protection product choices available, how they work and how to demonstrate the value to the client
- Be aware of the value of using a trust and children's critical illness cover can be added to protect younger families
- Know where and how to access Zurich support for advisers operating in the estate planning or protection markets

Andy Woollon, Zurich Insurance Company Ltd

11:00 - 11:05 Professional Qualifications Officer

11:05 - 11:25 Conversations Over Coffee

11:25 - 11:30 Chartered Champion

11:30 - 12:05 "All change please, all change". Why many current financial planning strategies regarding tax have reached the end of the line.

Learning objectives:

- Understand the fiscal changes over the last 12 months and it's impact on the tax rules
- Be able to describe the implications on financial planning and provide examples
- Be able to critically assess why this and consumer duty require different approaches than before.

Phil Griffin, Quilter Business Services Limited

12:05 - 12:40 Retirement Income – time for a new approach?

Learning Objectives:

- Understand the impact of the economic environment on retirement income portfolios
- Discuss the impact of markets on financial resilience and sustainability
- Recognise the market developments in guaranteed income

Karl Steadman, Just.

12:40 - 12:45 Education Outreach Ambassador

12:45 - 13:00 Word Cloud Activity

13:00 - 13:10 Membership Officer & Chair close

13:10 - 13:50 Lunch and Learn



Personal Finance Society

Standards. Professionalism. Trust.



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.

