



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

South Wales Regional Conference 1 2022

Venue:

The Celtic Manor Resort, Coldra Woods, The Usk Valley , NP18 1HQ

Date:

Wednesday 23 Mar 2022



South Wales Regional Conference 1 2022

In association with our Partners in Professionalism:



23-Mar-2022

08:45 - 09:30 Registration

09:30 - 09:40 Chair's Introduction

09:40 - 10:15 Catching the Sustainable Wave

Learning Objectives:

- Delegates will get an overview of the key takeaways from COP 26 that matter to everyone.
- Delegates will get an overview of the regulatory agenda facing advisers in 2022 and what will be expected of them.
- Delegates will get an insight in how taking a multi asset approach to sustainable investing can take advantage of these changing investing landscape whilst not compromising performance or portfolio diversification

Youssef Bougroum, M&G Investments

10:15 - 10:50 Does Higher Inflation Pose A Threat To Client Outcomes?

In this session you will gain an understanding of:

- The impact of different inflation regimes on market returns and clients long term goals
- What could cause inflation to remain high
- How to position for higher inflation

Dan Kemp, Morningstar Investment Management

10:50 - 10:55 Professional Qualifications Officer

10:55 - 11:15 Morning Break

11:15 - 11:20 Chartered Champion

11:20 - 11:55 Size Matters

Learning objectives:

- Understand what Investment Stewardship is and why is it important
- Understand how engagement interacts with ESG scoring,
- Understand what data is required for effective engagement
- Understand what 'good' looks like for E,S,G and T
- Understand what can you do when companies ignore investors - other than disinvesting

Ben Cherrington, Legal & General Investment Management

11:55 - 12:30 Lifetime Allowance - to 75 and beyond!

By attending this session, you will be able to:

- Understand the tax treatment of pension benefits above the lifetime allowance
- Recognise the main planning considerations around the lifetime allowance at age 75
- Discuss different strategies relating to the lifetime allowance

Martin Lines , JUST

12:30 - 12:35 Education Outreach Ambassador

12:35 - 13:15 Lunch

13:15 - 13:20 Membership Officer

13:20 - 13:55 Is Multi-Asset still fit for purpose?

Learning objectives

- Explain how policymakers have driven yields down, prices up, and caused inflation
- Investigate the consequences for savers looking into the future
- Describe the tools available to investors to achieve a better financial future

Talib Sheikh, Jupiter Asset Management

13:55 - 14:30 Tax planning is more important than ever – a topical, virtual case study

This session will give the delegate;

- An understanding of important recent tax changes that impact on personal financial planning
- An overview of current intergenerational planning strategies
- An understanding of the key tax and NIC implications of trading through a limited company or on a self-employed basis
- An understanding of the main principles involved in chargeable event tax calculations and appropriate planning to reduce tax
- An appreciation of current estate planning techniques including the preservation of the residence nil rate band and
- The key points of the Trust Registration Scheme

John Woolley,

14:30 - 14:35 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.

