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# Agenda

Stamford Regional Conference Q2  
2019

**Venue:**

Peterborough Marriot, Tesla Court Peterborough Business Park,  
Lynch Wood, PE2 6GB

**Date:**

Wednesday 22 May 2019



In association with our Partners in Professionalism:



Schroders

**SEVEN**   
Investment Management



22-May-2019

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

**09:30 - 09:40**      **Chair's Introduction**  
Tony Larkins , Beacon Wealth Management

**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**

Mark Hassall, Moneyology Limited

**10:55 - 11:20      Morning break**

**11:20 - 11:25      Chartered Champion**

**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 - 13:10 How technology is giving advisers, time, efficiency and growing revenues**

- Appreciate the results that technology is helping advice firms to realise
- Recognise how advice firms are using the technology available in the market to drive efficiency through their advice processes
- Identify what technology can deliver in your business.

Nick Eatock, Intelliflo

### **13:10 - 13:15 Membership Officer**

Mark Block, Leaf Financial Planning

**13:15 - 13:55      Lunch**

**13:55 - 14:30      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

**14:30 - 15:10      Protection session**

By the end of session event delegates will have gained an insight into:

- IDD and it’s “Acting in the customers best interests” principle, plus an awareness of the Senior Managers Regime and its requirements
- The IDD principle - an implied “duty of care”, to aid clients better access insurance
- Focus on delivering the best customer outcomes and what this means for the future of underwriting and improving access to insurance.

Steve Fallon , Legal & General

**15:10 - 15:15      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.

