



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Tyne Tees Autumn Conference

Venue:

Ramside Hall Hotel & Golf Club, Ramside Hall Hotel, Durham , DH1 1TD

Date:

Thursday 28 Sep 2023

CPD
CII Scheme
4:00



Tyne Tees Autumn Conference

In association with our Partners in Professionalism:



28-Sep-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 **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

10:25 - 11:00 "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.

Jamie Clark,

11:00 - 11:05 Professional Qualifications Officer

11:05 - 11:25 Conversations Over Coffee

11:25 - 11:30 Chartered Champion

11:30 - 12:05 "The Insiders' guide to the Value of Advice" – how to help your clients appreciate the benefits of your offering. (Fear not, this is not ANOTHER Consumer Duty presentation..)

In this session you will learn:

- Insights from 200+ of your peers
- What advisers generally view to be most important

- What many advisers are not focusing on
- Useful statistics that precisely quantify the value of financial advice
- A comprehensive list of adviser skills & attributes
- A roadmap to help you assess and convey your value to clients
- 3 case studies to show the different ways this can be done
- What clients think. There is often a sizeable mismatch between what advisers believe adds value versus what their clients perceive to be valuable

Jim Clay, Portfoliometrix

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 - 13:25 Lunch and Learn

13:25 - 13:40 Word Cloud Activity

13:40 - 13:45 Membership Officer

13:45 - 14:20 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

14:20 - 14:55 **SIPPs & Drawdown**
Tom Ryan,

14:55 - 15:00 **Chairs 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.

