



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Yorkshire Regional Conference Q4
2019

Venue:

Doncaster Racecourse, The Grandstand, Leger Way, Doncaster,
DN2 6BB

Date:

Tuesday 29 Oct 2019



In association with our Partners in Professionalism:

Cornelian
ASSET MANAGERS

 DYNAMIC
PLANNER

JUST.
RETHINK RETIREMENT


PRUDENTIAL

 **moneyinfo**


ZURICH

29-Oct-2019

08:45 - 09:30 Delegate Registration

09:30 - 09:40 Chair's welcome and AGM
Alan Sensicall, ADS Financial Planning

09:40 - 10:15 Pulling all the levers – from the normal to the niche

- Recognise key risk indicators, and the ways in which they can be interpreted
- Learn the different ways to dynamically manage risk
- Understand the benefits of a flexible approach to portfolio risk positioning

Andrew Naylor, Cornelian Asset Managers (North West and West Midlands)

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

David McCabe, Five Point Consulting Ltd

10:55 - 11:20 Morning break

11:20 - 11:25 Chartered Champion

Stephen Wilkinson, Charles Wilkinson Financial Plannin

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 Allowance...what allowance?

- An overview of the various annual allowances – how and when they are triggered
- How these annual allowances work alongside each other
- How to calculate any charge that may apply

Kirsty Anderson, Prudential

12:35 - 13:10 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

Sim Sangha, moneyinfo limited

13:10 - 13:15 Professional Qualifications Officer

Veronica Wilkinson, Charles Wilkinson Financial Plannin

13:15 - 13:55 Lunch

13:55 - 14:30 Protection Session: 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

14:30 - 15:30 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

Paul Duckworth, Chartered Financial Planner at Paul Duckworth IFA

15:30 - 15:35 Chair's Close



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.

