

Agenda Q1 Norfolk Regional Conference

Venue: De Vere Dunston Hall, Ipswich Rd, Norwich NR14 8PQ
Date: Wednesday, 14 January 2015

In association with our
Partners in Professionalism:



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08:30 - 09:00 Delegate registration

09:00 - 09:15 Welcome and introduction from the chairman
Michael Saunders

09:15 - 09:55 2015 – A year of challenges?

Economics – how strong will the global economy be?

Bonds – where now for bond investors?

Equities – what will drive returns?

Together with answers to these important questions, John Greenwood, Invesco Ltd’s Chief Economist, and key members of Invesco Perpetual’s fund management team will provide insight and analysis on the challenges and opportunities within their markets.

Learning objectives: be able to:-

- Understand how the macroeconomic outlook, in particular central bank policy, is expected to influence global markets in 2015
- Understand what drives bond market returns
- Understand where the best opportunities in equity markets are

Neil Dobson, Sales, Invesco Perpetual

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

09:55 - 10:35 Exploring strategic bond funds

The strategic bond fund sector continues to attract large industry flows. The diverse nature of the sector has resulted in increased attention from the media, with advisers encouraged to ‘look under the bonnet’ of their chosen strategies. With potential rate rises at the heart of many discussions, this module aims to explore the sector given allocation complexities in fixed interest markets. We aim to provide advisers with an understanding of the different strategies available when making asset allocation assessments. In addition, analysis of the key debt instruments being utilised by portfolio managers and in what environment they can be deployed will be discussed. Advisers should leave the presentation with a greater understanding of how strategic bond funds can be utilised within their client portfolios.

Learning objectives: be able to:-

- Understand the key features of strategic bond funds
- Explore some of the key debt instruments used by strategic bond fund managers
- Understand in what environments certain instruments can be utilised
- Monitor the sector and the variances of key funds within it

Chris Johns, Sales and Business Development, Jupiter

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

10:35 - 11:15 RDR adviser charges and services: good practice disclosure and delivery
TBC

Rory Percival, Technical Specialist/Investment Advisors and Platforms/Supervision Division, FCA

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

11:15 - 11:40 Coffee & Tea break

11:40 - 12:20 Right money, right hands, right time, it's a matter of trust (and tax) - IHT planning opportunities and an update on proposed Relevant Property Trusts changes

Learning objectives: be able to:-

- To look at the background to the current IHT regime and explore the key reasons why clients should be doing IHT planning today.
- Describe the process for effective IHT planning and explore briefly, areas that are often overlooked or misunderstood.
- Explain the opportunities to use insurance based solutions.
- Consider the impact and opportunities arising from the recent recommendations in HMRC's various consultation papers looking to simplify charges on trust.
- Highlight some useful planning tools that can support advisers in the client discussions

Andy Woollon, Strategic Partner Specialist, Zurich

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

12:20 - 13:00 Freedom and choice....and advice!

Learning objectives: be able to:-

- Share the detail around new-style drawdown
- Understand the implications of new ways of taking lump sums

- Explain the changes to annual allowances proposed from 2015
- Explain the proposed new annuity options
- Develop ideas for underpinning income in a cost-efficient way
- Balance the need for pensions security and flexibility

Martin Lines, Head of Business Development, Partnership

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

13:00 - 13:40 Lunch

13:40 - 14:55 Case Study - pre and post April pension planning opportunities

Learning objectives: - This case study will appraise delegates of:

- the most important changes that are due to take place with regard to pension flexibility from April 2015
- consider how this will affect individuals depending on the type of pension plan or scheme that they are a member of
- consider how those changes will impact on those individuals who are in or move into capped drawdown before 6th April 2015 and what their options will be
- look at the restrictions that will apply to people who take flexible pension benefits but who still wish to pay pension contributions
- examine the changes that have occurred to the taxation of lump sum death benefits paid under pension plans and look at their current planning options
- consider some of the traps and possible drawbacks of utilising the flexible pension rules

Tom Ryan

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

14:55 - 15:15 Coffee & Tea break

15:15 - 15:55 Social media - maximising the opportunity

Learning objectives: be able to:-

- Understand the growing role of social media in attracting and retaining clients
- Assess the key points made within the FCA's GC 'Social Media and Consumer Communications' paper
- Appreciate maximisation techniques when using the likes of LinkedIn/Twitter etc
- Measure return on investment from your social media activity

Bridget Greenwood, Director, Financial Social Media (UK)

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

15:55 - 16:00 **Chairman's closing remarks**

The morning session provides 3 hours 20 minutes CPD.

The afternoon session provides 1 hour 55 minutes CPD.

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 Q1 events can be included as part of your CPD requirement should you consider it relevant to your professional development needs.