

Agenda Q1 Isle Of Man Regional Conference

Venue: The Empress Hotel, Central Promenade, Douglas, Isle of Man IM2 4RA
Date: Wednesday, 9 March 2016

In association with our
Partners in Professionalism:



Please use this CPD recording agenda to record your CPD and take it home with you to upload to your records on the CII CPD Tool. Do not leave this behind.

08:30 - 09:00 Delegate registration

09:00 - 09:15 Welcome and introduction from the chairman
John Hockney

09:15 - 09:55 2016 - A better year for financial markets?

Learning objectives:

- Understand the main factors that will influence the global economy in 2016.
- Outline the key fundamental drivers impacting asset class performance in 2016.
- Understand where Invesco Perpetual's fund managers believe the best opportunities lie at the asset class, regional and sector level.

Neil Dobson, Presenter - 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 - 10:10 Soft skill session: How to build solid trust in seconds
(Part 1 of a 3-session presentation)

Bernie De Souza, Speaker, Author, Executive Performance Coach

10:10 - 10:50 Efficient Consumption - Driving the hybrid model

Learning objectives:

- Consider the latest developments and consultations relating to the implementation of pension freedoms
- Recognise how to balance both guarantees and flexibility in retirement
- Understand what is meant by the term 'hybrid' product
- Recognise the place for new product design and how innovation can create better client outcomes

Karen Lauder, Business Development Manager, Partnership

CPD Log

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10:50 - 10:55 Education Officer

10:55 - 11:15 **Coffee & Tea break**

11:15-11:55 **The New Dividend Tax Changes**

Learning objectives:

- Explain the key changes to the taxation of UK dividends from 6th April 2016 and who they'll affect
- Understand how the current taxation (calculations) of UK dividends compare to the new, highlighting who are the winners and losers
- Describe how the new dividend and personal savings allowances work in practice and the interaction with tax thresholds/traps
- Understand the impact of the changes and (dis)advantages on various funds, tax wrappers and trusts
- Consider the planning points and opportunities available for managing client investment portfolios (in retirement or using platforms)tax efficiently
- Understand how platforms can support advisers and clients

Andy Woollon, Wealth Presenter & 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?

11:55 - 12:10 **Soft skill session: The 15 Magic words to get more clients**

(Part 2 of a 3-session presentation)

Bernie De Souza, Speaker, Author, Executive Performance Coach

12:10 - 12:50 **Yield at what cost**

Learning objectives:

- Understand the requirement for both income and growth amongst an ageing demographic
- Challenge fund managers on their ability to generate yield without sacrificing capital
- Assess the risks associated with derivative use as a tool to boost income
- Understand the opportunity to utilise Distribution funds to generate steady income levels and manage capital in a simple and lower cost structure

Chris Johns, National Development Manager, Jupiter

CPD Log

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

12:50 - 12:55 **Membership Officer**

12:55 - 13:40 **Lunch**

13:40 - 13:55 **Soft skill session: The 4 stages to get appointments on the phone without rejection**

(Part 3 of a 3-session presentation)

Bernie De Souza, Speaker, Author, Executive Performance Coach

13:55-15:00 **Business and Personal Protection – meeting the needs of both company and key directors**

Learning Objectives:

- An understanding of the business and personal protection needs of a director/shareholder of a private limited company and the company itself.
 - An understanding of how arrangements can be set up on a flexible basis to meet the protection needs of the director(s)/shareholder(s) and the company.
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- An appreciation of the tax implications of such an arrangement and how tax efficiency can be enhanced.
- An awareness of how double option agreements work and how such option agreements and Wills are a necessary ingredient to an effective business protection arrangement.
- An understanding of keyperson needs and the various ways in which cover for this can be put in place.

Terry Bateman, Personal Financial Society Facilitator

CPD Log

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

15:00 - 15:05 Coffee & Tea collection

15:05 - 15:35 The 'ins and outs' of running an investment committee effectively

Learning objectives:

- Gain an understanding as to how you can ensure that an investment committee is running effectively?
- How to review the actions of an investment committee to ensure that they are following the clients instructions and risk profile
- Discover what lessons can be learnt from previous experiences in the industry, what is best practice and how can you be confident your chosen version of an investment committee can serve the best interests of the consumer?

Jamie Farquhar, Director of Business Development, Square Mile Investment Consulting and Research Limited

CPD Log

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15:35 Chairman's closing remarks

The morning session provides 3 hours 10 minutes CPD.

The afternoon session provides 2 hours 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.