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Agenda Q2 London Regional Conference

Venue: Chartered Insurance Institute, 20 Aldermanbury, London, EC2V 7HY
Date: Monday, 27 April 2015

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
Chris Holmes
- 09:15 - 09:55** The Budget
Learning objectives: TBC

Speaker TBC, Technical Connections

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** Lifetime Cash Flow Modelling
Learning objectives:
- The value of cash flow modelling
 - The downsides and limitations of cash flow modelling
 - How to use cash flow modelling effectively, including help in establishing capacity for loss.

Speaker TBC

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** Income planning in early retirement
Learning objectives:
- By attending this session delegates will be able to:
- Understand the particular challenges for “middle Britain” and the FCA’s current stance on minimum pots sizes for income drawdown
 - Identify ways in which those remaining invested in early retirement can manage the investment risk they are exposed to
 - Understand the differences between growth and income portfolios within a pension fund
 - Understand the options for measuring sustainable income for different clients during retirement

CPD Log

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11:15 - 11:40 Coffee & Tea break

11:40 - 12:20 Diversification: more important than ever?

Learning objectives:

- Understand the benefits of diversifying a portfolio and why it is especially important in the current market environment
- Describe how a diversified strategy can support clients' who are cautious and concerned about capital preservation
- Demonstrate how to construct a portfolio using alpha and beta building blocks

Speaker TBC, Blackrock

CPD Log

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

12:20 - 13:00 Can You Really Have it All?

Learning objectives:

- to explore how clients come to their decisions on their investment and income
- to identify the language we use to enable clients to think realistically about their future
- to consider how the Retirement Income Spectrum can be used in the new world of pensions freedom

Speaker TBC, Met Life

CPD Log

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

13:00 - 13:40 Lunch

13:40 - 14:55 Creating highly personalised advice solutions. Planes, trains and automobiles – the multiple routes of a retirement planning journey

Learning objectives:

- Consideration on new advice implications post 6/4/15 – does this change what you have done previously?
- Understanding the tax consequences of drawing income across different tax wrappers
- Looking at appropriate ways to analyse and make recommendations on legacy pension policies
- Introducing a simple and highly effective way of helping clients understand their retirement income needs

Don't just listen – learn by application of advice ideas

Speaker TBC, Old Mutual Wealth

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?

15:15 - 15:55 Crowdfunding – Capital for the 21st Century

Learning objectives:

- Understand the fundamentals of the three types of crowdfunding: donation, debt and equity.
- Understand the FCA’s regulatory approach to crowdfunding
- Assess the pros and cons of crowdfunding

Speaker TBC

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.