

Continuing Professional Development Certificate

Pensions: Defined Benefit transfer

Date: Wednesday 31 October 2018

Time: 1.15pm - 2.00pm

Speaker: Claire Trott, Head of Pension Strategy, Technical Connection

In this IIL financial planning lecture Claire discussed the issues surrounding defined benefit transfers in the current pension environment.

With the introduction of the pension freedoms in 2015 defined benefit transfers are more popular than ever but they aren't for everyone.

This lecture delved into why you should or shouldn't consider a transfer viable. Claire discussed what is required by way of advice and what benefits need to be formally assessed and by whom.

By the end of this lecture members would have gained an insight into:

- What benefits need advice
- Who can give this advice
- The pros and cons of defined benefit transfers
- Things to consider now and in the future with relation to defined benefits.



This lecture or podcast can be included as part of your CPD requirement should you consider it relevant to your professional development needs. It is recommended that you keep any evidence of the CPD activity you have completed and upload copies to the recording tool as the CII may ask to see this if your record is selected for review.