



Sheffield CII: Life & Pensions Society - Autumn Conference (26th September 2019)

Learning Objectives

1, Neal Bailey (Invesco): Macro View of Markets

- Review year-to-date market performance of each of the major asset classes.
- Consider the potential challenges to economic growth through current geopolitical issues, and highlight issues which are less significant.
- Identify the means by which investors may take best advantage from the anticipated future investment climate.

2, James Clunie (Jupiter Asset Management): Investment Strategies in Volatile Markets

- Understand the construction and operation of a working alternative investment strategy fund
- Review what have been the successful and unsuccessful strategies applied since fund launch
- Consider the historic market context and market outlook

3, Stuart Podmore (Schroders): Seeking Sustainable Income

- Describe the inescapable investment truth that will define the decade ahead.
- Identify the big changes in the adviser's world and the constants that influence investment characteristics to meet the client objectives.
- Understand how we aim to provide solutions that offer more than the sum of the parts.

4, Fiona Tait (Intelligent Pensions): Pension Transfer landscape Review

- Understand the regulator's requirements with regard to DB pension transfers (and the consequences of getting it wrong).
- Identify possible changes that need to be made to your own processes.
- Obtain an insight into market developments and how they might evolve.



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5, John Glover (Money Alive): Investor Education and Pension Transfer Triage

- Understand the need for a robust pension transfer triage process.
- Consider the regulatory push for the quality of pension transfer advice provided to improve.
- Review the steps required to be taken to meet the conditions for the PFS Gold Standard of transfer advice.

6, Kevin Doran (AJ Bell): Centralised Retirement Provision

- Consider the need for a Centralised Retirement Proposition (CRP) and identify the difference between this and a Centralised Investment Proposition.
- Review factors important to incorporate in CRP such as longevity, fund survival and safe withdrawal levels.
- Identify means by which a robust CRP can both satisfy process-driven requirements and provide an effective tool for business acquisition and growth.

7, Neil Jones (Canada Life): Pensions and Estate Planning

- Review the merits of a pension investment as part of the estate planning process.
- Identify the advantages and disadvantages from a taxation and planning perspective of pension investment and the other investible asset classes.
- Consider real-world case studies as a means of identifying better outcomes for clients.

Owen Wright DipPFS
Chair - Sheffield CII: Life & Pensions Society