



# Continuing Professional Development Certificate

## Advice Alpha delivering better retirement outcomes

**Date** Tuesday 12 May 2020

**Time** 1.00pm - 2.00pm

**Speaker** Claire Trott FPFS, Head of Pensions Strategy, Technical Connection

### Learning outcomes or Lecture review

In this IIL financial planning webinar, Claire Trott discussed the topical pensions issues that need to be considered at the start of the tax year. In particular, what to consider for those now impacted by the changes to the tapered annual allowance, both positively and negatively.

By participating in this webinar members will have gained an insight into:

- How the annual allowance and tax relief works
- The impact of different income types on pension contributions
- How to deal with any tax charges that may be payable.



CII CPD event accredited - demonstrates the quality of an event and that it meets CII member CPD scheme requirements.

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.