



Continuing Professional Development Certificate

Your personal finances - an introduction

Date

Tuesday 10 November 2020

Time

2.00pm - 3.00pm

Speaker

Angela Lloyd-Read FPFS, Chartered Financial Planner, Connor Broadley Wealth Management

In this Young Members' Committee webinar, Angela Lloyd-Read FPFS Chartered Financial Planner introduced members to the world of financial planning through the lens of their own personal finances. Angela explained how to get help with budgeting and discussed the link between risk and reward in savings and investments.

By the end of this webinar members will have gained an insight into:

- Pensions, how to make the most of employer pension provision, are you still in the default fund?
- Government initiatives to assist with property purchase
- Wills and lasting power of attorney



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.