AJBell Investcentre
ON THE ROAD

AGENDA

Venue
The Bonham Hotel
35 Drumsheugh Gardens, Edinburgh EH3 7RN

8.30am **Registration opens, refreshments served**

9am **Gary Dale, Sales Director - AJ Bell**
Welcome and introductions

9.10am **Colin Cunningham, Business Development Manager - AJ Bell**
Platform update
Colin will deliver a short update on everything that's new with AJ Bell Investcentre, its products and investment solutions.

9.20am **Russ Mould, Investment Director - AJ Bell**
Market update and the 2018 outlook
Investment Director Russ Mould looks at the key economic and market themes that could influence portfolio performance for the remainder of 2018.

9.50am **Lisa Webster, Technical Resources Consultant - AJ Bell**
Technical roundup
Lisa will take a look at the changes that could impact advised clients following the Retirement Outcomes Review, and what it all means for advisers. She will also examine issues with ill health transfers, the latest pension IHT matters, and what constitutes ill health in the context of pensions.

10.25am **Ryan Hughes, Head of Active Portfolios - AJ Bell**
Generating sustainable income for retirement in a rising interest rate environment
After a multi-year bull market and ultra-low interest rates, is it possible to generate an attractive sustainable income for retirement without taking excessive risk? In this presentation, Ryan Hughes, Head of Active Portfolios will look at the move from accumulation to decumulation, incorporating some of the findings from the FCAs Retirement Outcome Review before assessing some different approaches to generating income and how sustainable these might be.

11am **Session concludes**