



# CONNECT

12/12/2018 | EXCHANGE QUAY

## AGENDA

- |        |   |        |  |
|--------|---|--------|--|
| 2.00pm | <b>Registration</b><br>Tea, coffee and refreshments served.   | 4.15pm | <b>Lee Summerfield, UX Designer - AJ Bell</b><br><b>What is UX? (Hint: it's all about you!)</b><br>A session explaining exactly what UX is, how we are implementing UX at AJ Bell and what it all means for our users of AJ Bell Investcentre.   |
| 2.30pm | <b>Andy Witter, Business Development Manager - AJ Bell Investcentre</b><br><b>Opening introductions and welcome</b>   | 4.30pm | <b>Andy Witter/Matthew Jonas, Business Development Manager - AJ Bell Investcentre</b><br><b>Functionality update</b><br>A brief business update followed by a walkthrough of new functionality and a sneak peek at improvements to come in 2019. |
| 2.35pm | <b>Ryan Hughes, Head of Active Portfolios - AJ Bell Investments</b><br><b>Demystifying fund selection</b><br>Ryan will discuss why fund selection is important, and the key points to consider when researching funds.  | 4.40pm | <b>Test your knowledge Quiz time</b><br>Take part in our quiz and test your new-found knowledge. The winners will receive a bottle of Prosecco.  |
| 3.05pm | <b>Lisa Webster, Senior Technical Consultant - AJ Bell</b><br><b>Making the most of pension allowances</b><br>Lisa will take a look at the interaction of the various annual allowances in pensions – including tapered annual allowance, money purchase annual allowance and the alternative annual allowance. Using case studies she will explain how pension contributions can be maximised for tax planning purposes, and what the options are where allowances are exceeded. | 5.00pm | <b>Network</b><br><b>Eat, drink and be merry</b><br>As the festive season is upon us, we will have some Christmas music, mulled wine and hog roast sandwiches to end the day whilst you relax and network with your peers.                       |
| 3.35pm | <b>Break</b><br>Tea, coffee and refreshments served.  | 7.00pm | <b>Close</b>   |
| 3.45pm | <b>Charlene Young, Senior Technical Consultant - AJ Bell</b><br><b>Inheritance Tax (IHT) and pensions</b><br>It is said that pensions are generally free from IHT – but when might HMRC be able to make a claim? In this technical session, Charlene will explore the detail behind the rules and the impact of legal judgements, including HMRC's victory at the Court of Appeal in the recent Staveley case.  |        |  |
- 