



# AJ Bell CONNECT

01/05/2019 | LONDON

## AGENDA

- 1.30pm **Registration**  
Tea, coffee and refreshments served.
- 2.00pm **Alison Mollard, Business Development Manager - AJ Bell Investcentre**  
**Opening introductions and welcome**
- 2.05pm **Ryan Hughes, Head of Active Portfolios - AJ Bell Investments**  
**Behavioural Finance**  
Ryan will explain the ins and outs of behavioural finance and why it is an important and very relevant issue in today's markets. As well as covering the key concepts of behavioural finance, Ryan will also discuss the issues investors should consider in order to avoid any pitfalls.
- 2.30pm **Charlene Young, Senior Technical Consultant - AJ Bell**  
**Inheritance Tax (IHT) and pensions**  
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 now infamous Staveley case.
- 3.00pm **Jasveet Brar, Analyst - M&G Investments**  
**Can we invest for profit and positive impact?**  
Impact investing through listed equities provides the opportunity to create attractive, long-term financial returns while also doing measurable good for society and the environment. It does so by investing in companies that provide solutions to the most pressing global challenges, such as climate change, pollution, poor health and inequality. Jasveet will explain how M&G's approach is based on our dedicated III framework for identifying and measuring impact, inspired by the UN Sustainable Development Goals.
- 3.30pm **Alison Mollard, Business Development Manager - AJ Bell Investcentre**  
**Platform update**  
Alison will deliver a short roundup on everything that's new with AJ Bell, including a business update and details of the forthcoming developments on the AJ Bell Investcentre platform.
- 3.45pm **Test your knowledge**  
**Quiz time**  
Take part in our quiz and test your new-found knowledge. The winners will receive a bottle of Prosecco.
- 4.00pm **Network**  
Eat, drink and chit-chat
- 6.00pm **Close**
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