

Let's connect

Agenda

Date: Thursday 9 September 2021

Time: 3.00pm – 5.00pm

3.00pm Ryan Hughes, Head of Investment Research – AJ Bell Investments

Market update

Ryan will provide an update highlighting the recent key events in the investment industry, before introducing the AJ Bell Fundamentals service and showing you how this latest initiative from AJ Bell can further support advisers' investment research.

3.30pm James Bird, National Development Manager – Fidelity International

The roaring 2020s

The roaring 1920s saw widespread adoption of the assembly line, the automobile, radio, motion pictures, indoor plumbing, and labour saving electric appliances. Consumerism and mass culture took shape. It was the decade of art deco and jazz, Coco Chanel & Walt Disney, The Great Gatsby and the Harlem Renaissance. It was the first truly modern decade. So it is tempting to ask, once the virus passes, will the 2020s roar the way the 1920s did? In this presentation, Fidelity International challenge the market assumptions and looks at the world of asset allocation a little bit differently. They will cover beneficiary sectors, regions and the potential outcome for future portfolios.

4.00pm Charlene Young, Senior Technical Consultant – AJ Bell

To EET or not to EET? That is the question...

In this session, Charlene will look at the retirement planning opportunities for clients who could save using both a pension and a Lifetime ISA (LISA). Is one wrapper better for contributions than the other at different levels of income, and what does the picture look like when it comes to drawing funds at retirement? This 30-minute session will cover a range of topics and include calculations and examples to bring the numbers to life.

4.30pm Matthew Jonas, Business Development Manager – AJ Bell Investcentre

AJ Bell Investcentre – what's new?

In the absence of physical events, it's been a while since we connected with you, our paraplanner network. There's been change for us all since the pandemic – and the AJ Bell Investcentre platform is no exception. In this short session, our regional Business Development Manager, Matt, will provide an all-round update on our product developments, investment range additions, added functionality and latest website enhancements.

4.45pm Test your knowledge

Quiz time

Take part in our virtual quiz and test your new-found knowledge. Our top three finishers will receive a bottle of Prosecco in the post.

5.00pm Close