



AJBell Investcentre ON THE ROAD

AGENDA

Venue

Tudor Park Marriott Hotel and Country Club

Ashford Road, Bearsted Maidstone Kent ME14 4NQ

2.30pm Registration

3.00pm Gary Dale - Sales Director, AJ Bell *Business and platform update*

Gary will open the session with a welcome and introduction to each of the sessions. He will also provide a short overview of what 2018 holds for AJ Bell, before looking at the planned enhancements to the AJ Bell Investcentre platform and how they will benefit you and your clients.

3.15pm Lisa Webster - Technical Resources Consultant, AJ Bell *Technical round-up*

Our Technical Resources Consultant, Lisa Webster, will provide a general overview of the most recent tax planning challenges for pensions and ISAs. She will also cover the latest DB transfer issues.

3.45pm Abraham Okusanya - Founder of FinalytiQ *Cash flow planning - building a sustainable post-retirement investment strategy*

In this session Abraham will outline his view on the science behind sustainable withdrawal rates for at retirement portfolios.

He'll explore some fascinating new research on how asset allocation, cash buffers and various rebalancing strategies impact on sustainable withdrawal in a retirement portfolio and he'll also discuss the myths and realities of how spending patterns change in retirement and how advisers can help clients manage longevity risk in retirement.

4.30pm Kevin Doran - Managing Director, AJ Bell Investments *The outlook for 2018 - sustainable yields amidst low interest rates*

Our new head of AJ Bell Investments, Kevin Doran, will take a look at how portfolios must adapt to the new normal when building sustainable yields for clients in this era of low interest rates. He will also introduce you to the new AJ Bell investments team and outline plans for our in-house investments range which, amongst other things, has been designed to deliver "active performance at passive prices".

5.00pm Event closes