AJBell CONNECT

09/07/2019 | LEEDS

AGENDA

9.30am **Registration**

Tea, coffee and refreshments served.

10.00am **Matt Jonas, Business Development Manager - AJ Bell Investcentre**

Opening introductions and welcome

10.05am **Simon Molica, Fund Manager: Active Portfolios - AJ Bell Investments**

Behavioural Finance

Simon will explain the ins and outs of behavioural finance and why it is an important and very relevant topic in today's markets. As well as discussing the key concepts of behavioural finance, Simon will look at the issues investors should consider in order to avoid any pitfalls.

10.35am **Lisa Webster, Senior Technical Consultant – AJ Bell**

Investing for the young

Lisa will take a look at the options for tax-efficient investing for children and young people. Using case studies she will investigate the planning options with ISAs, SIPPs and bare trust accounts, looking at the practical considerations of how to maximise all the family's allowances.

11.05am **Tom Selby, Senior Analyst – AJ Bell Media**

Pensions Dashboards: Wave of the future or another retirement fad?

The Government is due to implement 'Pensions Dashboards' this year, with the aim of helping reunite savers with lost pots and boosting engagement. In this session Senior Analyst, Tom Selby, will look at the impact this latest intervention could have on retirement planning, and ask whether most people will ever really care about their pensions.

11.30am **Matt Jonas, Business Development Manager – AJ Bell Investcentre**

Next generation planning

Matt will talk about generational financial planning and how AJ Bell is helping advisers develop early relationships with beneficiaries of current assets #AJBellNextGen.

11.45am **Test your knowledge**

Quiz time

Take part in our quiz and test your new-found knowledge. The winners will receive a bottle of Prosecco.

12.00pm **Network**

Eat, drink and chit-chat

1.00pm **Close**