



AJBell Investcentre ON THE ROAD

AGENDA

24 March 2021

Venue

Hampton by Hilton, Exeter Airport, Clyst Honiton, Exeter EX5 2LJ

12.30pm Registration opens and refreshments served

1pm James Bell, Business Development Manager, AJ Bell

Platform update

Your regional Business Development Manager will set the scene for the morning with a short business update, before highlighting the recent platform developments we have delivered to help you guide your clients through the current financial services landscape.

1.20pm Ryan Hughes, Head of Active Portfolios, AJ Bell Investments

COVID-19: a lesson learnt

Ryan will provide a review on how the investment community has reacted to the COVID-19 crisis. Looking at market volatility and the economic outlook, he will discuss key points on long-term investing and typical behaviours displaced in turbulent times.

1.55pm Rachel Vahey, Senior Technical Consultant, AJ Bell

Technical roundup

Rachel will take a look at the Government's latest view of pensions and what it and the regulators are doing to help ease the strain on advisers and clients following the COVID-19 disruption. She'll look at how these measures tackle a variety of planning issues and highlight where there is still room for improvement.

2.30pm Close