



AJBell Investcentre ON THE ROAD

AGENDA

17 March 2021

Venue

Madejski Stadium, Junction 11, M4 Reading RG2 0FL

9am Registration opens and refreshments served

9.30am Mike Parker, 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.

9.45am Simon Molica, Fund Manager: Active Portfolios, AJ Bell Investments

COVID-19: a lesson learnt

Simon 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.

10.20am 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.

11am Close