



**Date: Thursday 13 June 2024**

**Venue: Stormont Hotel, Upper Newtownards Road, Belfast BT4 3LP**

**8.30am Registration opens and refreshments served.**

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**9.00am Kenny Boyd, Business Development Manager – AJ Bell Investcentre**

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#### **Platform update**

Kenny will give a short update on AJ Bell Investcentre, including a look at our business financials and the latest platform developments before finishing with a review of the AJ Bell Investment range.

**9.15am Rachel Vahey, Head of Public Policy – AJ Bell**

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#### **Why the Retirement Income Review needs to be at the top of your priority list.**

Rachel will provide an overview of the Retirement Income Review and look at how this links into to your Consumer Duty requirements. She'll dive into some of the FCA's concerns and outline what 'value' really looks like to both you and your clients.

**9.45am Lisa Webster, Senior Technical Consultant – AJ Bell**

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#### **Technical roundup**

It wouldn't be an AJ Bell 'On the Road' event without our famous technical roundup. In this session we'll ensure you don't fall foul of any FCA developments, and are kept up to speed with the latest regulatory changes including a focus on the abolition of the lifetime allowance. Our one-stop shop to keep you updated on the important stuff you and your clients need to know about.

**10.30am Close**

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