



Date: Monday 26 February 2024

**Venue: Waldorf Astoria, Princes Street,
Edinburgh EH1 2AB**

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

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

Platform update

Kenny will give a short update on AJ Bell Investcentre, including a look at our business financials and the latest platform developments.

**9.15am Joshua Croft, Senior Technical
Consultant – AJ Bell**

Technical roundup

It wouldn't be an AJ Bell 'On the Road' event without our infamous 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 planned 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.

**10.00am Mel Holman, Managing Director –
CATS**

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

We are looking forward to welcoming Mel Holman, Managing Director of CATS as our spring guest speaker. Mel will provide an overview of the Retirement Income Review, looking at the true meaning of fair value and how this links into to your Consumer Duty requirements. She'll dive into some of the FCA's concerns and ask what else they should be addressing. Linking all of this together she'll help decipher what 'value' really looks like to both you and your clients.

**10.50am Andrew Adshead, Business
Development Manager –
Investments – AJ Bell**

Retirement Solutions

Andrew will discuss a variety of 'at retirement' solutions taking into consideration volatility bands and risk. This insightful session should help you evaluate your current solutions, and check they work for you and your clients, whilst taking into account regulatory considerations.

11.00am Close