



**Date: Wednesday 18 May 2022**

**Venue: Carus Green Golf Club, Burnside Road, Kendal, LA9 6EB**

**9.30am Registration opens and refreshments served**

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**10.00am Matthew Jonas, Business Development Manager – AJ Bell**

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### **Platform update**

Your regional Business Development Manager will deliver a short platform market update and touch upon the business financials at AJ Bell.

**10.20am Tom Selby, Head of Retirement Policy – AJ Bell**

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### **The latest on retirement planning**

Tom will provide an overview on all things retirement planning, what's new, what's in the pipeline and what's currently making the headlines.

**10.50am Terry McGivern, Senior Research Analyst – AJ Bell Investments**

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### **Capital market assumptions and risk profiling**

So, you're building a CIP and looking at a blank sheet of paper. Where to start? In this session Terry takes a walk through the range of asset classes available to investors, and proposes a way to think about future risks, returns and asset allocation. Armed with that information, he'll then take a look at how risk profiling tools work, and how they match up clients to their 'perfect' portfolios.

**11.20am Lisa Webster, Senior Technical Consultant – AJ Bell**

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### **Technical roundup**

Lisa Webster, will provide a technical roundup focusing on industry news before turning her attention to the FCA regulations now and into the future. She'll highlight how recent and upcoming changes could impact advisers and their clients.

**12.00pm Close**

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