



AJBell Investcentre ON THE ROAD

AGENDA

Venue

Leeds United Football Club
Elland Road, Leeds LS11 0ES

2.30pm Registration opens and refreshments served

3pm Gary Dale, Sales Director - AJ Bell
Welcome and introductions

3.05pm Matthew Jonas, Business Development Manager - AJ Bell
Platform update

Matthew will deliver a short update on everything that's new with AJ Bell, including a business update and details on the forthcoming developments on the AJ Bell Investcentre platform.

3.15pm Robin Powell, Director - Regis Media
Price versus value – how to justify investment costs

Robin Powell from The Evidence-Based Investor explores the cost of investing and the questions advisers need to ask to ensure that the products and strategies they recommend are in their clients' best interests.

Robin will analyse and outline the impact of fees and charges on long-term net returns. He will also look at whether cost is a predictor of future fund performance; how you calculate the total cost an investor pays; whether it is worth paying a premium for active management; and whether you should stick to low-cost index funds, or if you can justify a blended approach.

3.45pm Charlene Young, Senior Technical Consultant - AJ Bell
Plexit: How hard is it to leave your platform for another?

Between PROD and the Platform Market Study, the FCA is doubling its focus on advised platforms and suitability. Charlene will take a look at the barriers faced by advisers when looking to switch platforms for existing clients.

4.05pm Rory Percival, Regulatory Expert
Understanding the FCA's PROD rules

The FCA's PROD rules have been in force for over a year now but there is concern that many firms are not adequately familiar with them or how to comply. Rory takes a deep dive into the PROD rules and looks at how advisers can comply in a good practice way that may also help firms be more robust in their approach to investment and platform selection, and advisory services to their clients.

4.35pm Kevin Doran, Chief Investment Officer - AJ Bell
The A-Z of CRP

With over a third of folk who take financial advice already in retirement, we take a look under the bonnet of a Central Retirement Proposition and see how the pieces of the jigsaw fit together, especially in a PROD environment.

5pm Close