



**Date: Thursday 29 February 2024**

**Venue: Leonardo Royal London St Paul's,  
10 Godliman Street, London EC4V 5AJ**

**9.00am      Registration opens and refreshments served.**

**9.30am      Alison Mollard, Head of Sales – AJ Bell Investcentre**

### Platform update

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

**9.40am      Russ Mould, Investment Director – AJ Bell**

### Outlook for 2024

In his talk, our Investment Director, Russ Mould, will look at the potential outlook for economies, markets and portfolios in the year ahead and beyond.

**10.00am      James Brennan, Director – CATS**

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

We are looking forward to welcoming James Brennan, Director of CATS as our spring tour guest speaker. James 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. He'll dive into some of the FCA's concerns and ask what else they should be addressing. Linking all of this together he'll help decipher what 'value' really looks like to both you and your clients.

**10.45am      Lisa Webster, 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.

**11.20am      Brian Donald, Business Development Manager – Investments – AJ Bell**

### Retirement Solutions

Brian 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.

**11.30am      Close**