

OFF THE ROAD

Roadshow Special – Spring 2021 agenda

Date: Thursday 18 March 2021

**10.00am Gary Dale, Sales Director – AJ Bell
Investcentre**

Business and platform update

Gary will provide an update on the latest AJ Bell business figures and the platform market, as well as a run-through of the latest AJ Bell Investcentre products and developments.

**10.10am Charlene Young, Senior Technical
Consultant – AJ Bell**

What the f...urlough?

Twelve months ago, nobody had heard of the word furlough. With the UK's vaccine rollout continuing at impressive speed, hope is shifting to life after lockdown and focus on how the money spent supporting lives and livelihoods might be repaid. In this session, Charlene will look at the weird and wonderful policy proposals that have reportedly crossed the desk of the Chancellor – and what impact they could have on advisers and their clients. She will also look at whether the support packages highlight the need to change the conversation around employment, self-employment and everything in between.

**10.30am Rachel Vahey, Senior Technical Consultant
– AJ Bell**

Scams, nudges and retirement advice; what's next for pensions?

There's no such thing as a quiet year in pensions. As lockdown lessens, regulators and the Government will get back to the day-to-day business of changing the world of pensions one policy at a time. Rachel will take you through the mammoth tasks that lie ahead in the next few months, including stopping the scammers, nudging customers towards making better decisions, and taking a look at the nature of advice given to customers making retirement income decisions.

**10.50am Lisa Webster, Senior Technical Consultant
– AJ Bell**

Keep calm and carry forward

Many clients will have experienced disruption to their cash flow in 2020/21 – be it unexpected surplus funds due to restricted spending, or an unwelcome hit to income. Lisa will take a look at how to time pension contributions for maximum tax efficiency, with a look at both carry forward and the impact of the taper rules.

**11.10am Kevin Doran, Chief Investment Officer
– AJ Bell Investments**

Build back better?

Whilst the human consequences of COVID-19 have been immense, the pandemic has also laid low any semblance of sensible fiscal or monetary policy. In an effort to put the economy back on its feet, the search for short-term growth seems set to unleash a host of unintended consequences. These can include low interest rates and low yields on cautious profiles – all with no downside movement in the underlying management costs. Kevin will also look at conditions where inflation rears its head and will demonstrate how just such conditions are about to come into existence. Should you incorporate such factors into your investment models, ready for the regulator to come knocking? Avoid the next industry mis-selling scandal whilst you still can.

11.30am Close