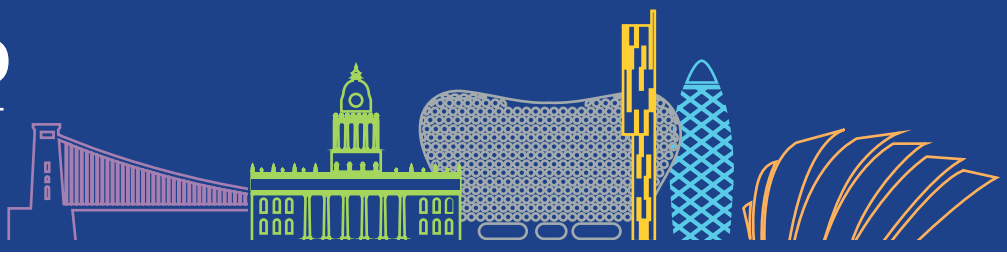
ON THE ROAD

Agenda



Date: Wednesday 8 February 2023

Venue: The National Conference Centre, Coventry Rd, Bickenhill, Hampton-in-Arden, Solihull, B92 0EJ

9.00am **Registration opens and refreshments served**

9.30am **Billy Singh, Business Development Manager, AJ Bell**

Platform update

Billy will give a short update on AJ Bell Investcentre, including a look at our business financials, and the latest performance of our AJ Bell Investments range. He'll also look at developments in the wider platform market as a whole.

9.45am **Ryan Hughes, Head of Investment Partnerships, AJ Bell**

Are bonds back in business?

After a tumultuous year for fixed interest, we examine what caused the turmoil and, more importantly, where it leaves bonds today. We'll also assess the outlook for fixed interest vehicles, and how the Investment Team has adapted the way we use them within our multi-asset solutions.

10.15am **John Chew, Sales Technical Specialist – Pension and Estate Planning, Canada Life**

Tax planning with bonds post Autumn Statement

The Chancellor's decision to reduce Capital Gains Tax exemption levels and the dividend allowance could leave many of your clients facing higher tax bills. As a result, offshore bonds may look like a more attractive home for their money. As well as examining the impact of the Autumn Statement changes, this session will also set out the various features and benefits of offshore bonds for both individual and trustee clients.

10.45am **Lisa Webster, Senior Technical Consultant, AJ Bell**

Technical roundup

Focusing on industry news, Lisa's roundup is designed to keep you updated on all the key technical issues of the day. Her talk will include a detailed look at the latest regulatory changes coming down the line from the FCA, and how these could impact you and your clients.

11.30am **Close**