



Date: Wednesday 15 May 2024

**Venue: Aztec Hotel & Spa, Aztec West,
Almondsbury, Bristol BS32 4TS**

9.00am Registration opens and refreshments served.

9.30am Greg Morton, Business Development Manager – AJ Bell Investcentre

Platform update

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

9.45am 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.

10.05am Rachel Vahey, Head of Public Policy – AJ Bell

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

Rachel will provide an overview of the Retirement Income Review and look at how this links into to your Consumer Duty requirements. She'll dive into some of the FCA's concerns and outline what 'value' really looks like to both you and your clients.

10.35am Lisa Webster, Senior Technical Consultant – AJ Bell

Technical roundup

It wouldn't be an AJ Bell 'On the Road' event without our famous 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 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.

11.15am Close
