

Increasing Pension Awareness and Business Opportunities

Core Details

 2 CPD Hours

Certificate of attendance

In-house Course

This course works well as an in-house event, contact us to discuss your needs on 0203 178 4230 or email info@fstp.co.uk

Overview

As a busy Investment Manager or Adviser, finding a quality programme of targeted topic related CPD can be a time consuming and tedious task.

Don't worry you are not alone. No more time spent searching for the next training session available from an awarding body, or having to search for a public open course. You can focus your time back on your key daily activities.

FSTP have created a suit of targeted CPD sessions that are regularly updated, and can be repeated annually. These CPD events are designed to be run in house at your offices, on dates and times suitable for your team.

The sessions are designed for those of you who are considering the clients complete financial circumstances, in line with the regulators suitability requirements. Each CPD session will take you through the key information that is crucial you are up to date with as part of your ongoing CPD knowledge. They are aligned to the RDR Apex standards.

These in house sessions will enable you and your colleagues to recognise when to appropriately 'sign post' your clients to other internal or external experts who can discuss the individuals specific needs.

Agenda

Session	Learning Outcomes
Free impartial guidance	<ul style="list-style-type: none"> To understand the relevance of the provision of the guidance guarantee, and what that means
The basic facts	<ul style="list-style-type: none"> To be able to understand the changes in pension access rules that came into effect in April 2015, and be able to apply those changes to a variety of client circumstances To understand the various tax implications of the new pension access rules, and consider these in the context of a client's situation and in line with suitability considerations
FCA expectations	<ul style="list-style-type: none"> To gain an overview of the Regulator's expectations with regards to the changing pensions advice landscape and your responsibilities



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