

# Offshore Bonds

## Overview

As an 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.

## 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](mailto:info@fstp.co.uk)*

## Agenda

Session	Learning Outcomes
Legal Development of Offshore Bonds and Tax Advantages	Understand how these products became available and when they may be appropriate
Personalised Portfolio Bond	Consider how this may be applied to individual clients
The Rules	Knowledge of the rules and ability to explain to a client
HMRC Penalties	Understand the implication of inclusion within portfolios
Contractual Requirements	What you need to consider?
Internal Controls	Understand how the technical knowledge aligned to your internal controls
Evaluating Stocks against the Rules	Be able to assess stock selection in line with requirements
QROPS/QNUPS – considerations	Know how and when these may be used coupled with knowledge of the client



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