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PRUDENTIAL KICKS OFF 2018 WITH NATIONWIDE ‘PLANNING MATTERS’ SEMINARS FOR ADVISERS

Prudential will begin 2018 by hosting a series of nationwide ‘Planning Matters’ seminars for financial advisers.

At the sessions, which run from 24 January to 22 March 2018 and cover 21 locations across the UK, Prudential’s pension and investment experts will look at the main regulatory and technical considerations for pension transfers and focus on how to deliver evidence-based strategies to meet clients’ retirement income needs.

The seminars are free to attend, last for two hours and qualify for 120 mins Continuous Professional Development from the Chartered Institute of Securities & Investment (CISI) and the Chartered Insurance Institute. By the end of the seminar, advisers will have a better understanding of:

- The regulatory requirements of pension transfers
- What constitutes an evidence-based strategy for retirement income needs
- The role of other tax wrappers in meeting clients’ retirement needs
- A retirement case study to review the main strategies for income
- Hard, soft or no deal – the impact of different Brexit scenarios on advisers’ portfolios
- What lies beyond bonds, equities and real estate for a multi-asset investment fund

Vince Smith-Hughes, director of specialist business support at Prudential, said: “It’s an excellent time to be a financial adviser as more and more clients are realising the value of advice. Since the introduction of pension freedoms looking for advice on retirement planning is high on the list for many clients and we know that income drawdown planning is seen as a key advice area by many advisers.

“In this our latest series of ‘Planning Matters’ seminars, we’ll focus on strategies to further help advisers deliver their clients’ retirement income needs.”

Financial advisers will receive email invitations from Prudential to register for the events. Any financial advisers who would like to attend and have not received an email, should contact their Prudential Account Manager or email seminars@prudential-events.co.uk.

Locations and dates of Prudential ‘Planning Matters’ seminars:

Location	Date
Surrey	24 January
Fareham	25 January
Edinburgh	30 January
Glasgow	31 January
Belfast	1 February
Newcastle	6 February
Leeds	8 February
Peterborough	20 February
Essex	21 February
Reading	22 February
Preston	27 February
Manchester	28 February
East Midlands	1 March
Aberdeen	6 March
London	7 March
Birmingham	13 March
Wolverhampton	14 March
Watford	15 March
Cardiff	20 March
Bristol	21 March
Exeter	22 March

-Ends-

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