

Self Invested Personal Pensions & Small Self Administered Schemes

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 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.

Agenda

Session	Learning Outcomes
Annual Allowance / Lifetime allowance (Post 5.4.15)	Understand what the allowances are and the impact it may have on your clients
Options at retirement (Post 5.4.15)	Know the options available to them and be able to explain the basics of choices
Overview of SIPPs	Understand what and how they may be appropriate and how they operate including the role of the Investment Manager
Overview of SSASs	Consider when clients may find SSAS a useful alternative compared with other routes
Lending & Borrowing from SSAS & SIPPs	Know the limitations and legal restrictions of stock selection and the relationship and responsibilities of all the parties involved



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