

MEET THE JONESES WEBINAR SERIES

LEARNING OBJECTIVES

APPROVED FOR ADVISER USE | AUGUST 2020



Meet the Joneses - intergenerational planning session one

The first of our Meet the Joneses webinars focusses on Disqualifying pension credits, Group connected party purchase, and; Expression of Wishes with specific assets, covering the following learning objectives:

- To understand the possible lifetime allowance implications of a pension sharing order on each party
- To understand when a pension credit factor can be applied for
- To understand the key considerations for connected party transactions with commercial property
- To understand how an expression of wishes may be structured to help avoid some of the potential problems and restrictions caused by the current rules

CPD On Demand hub

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