

# MEET THE JONESES WEBINAR SERIES

## LEARNING OBJECTIVES

APPROVED FOR ADVISER USE | AUGUST 2020



### Meet the Joneses - intergenerational planning session two

The second of our Meet the Joneses webinars focusses on inherited benefits without an expression of wishes and contributions made from death benefits, covering the following learning objectives:

- To understand when beneficiaries' drawdown is available, and how this differs depending on whether the funds are already in beneficiaries' drawdown
- To understand the flexibility which may be available to beneficiaries when their options are limited by legislation
- To understand how death benefits could be used to fund larger contributions
- To understand the options available when a contribution turns out to be in excess of relevant earnings

#### CPD On Demand hub

Keep up to date with our latest CPD content by visiting our [CPD On Demand hub](https://www.curtisbanks.co.uk/cpd) on our website [www.curtisbanks.co.uk](https://www.curtisbanks.co.uk)

Curtis Banks Group plc (registered number 07934492) and Curtis Banks Limited (registered number 06758825) are companies registered in England & Wales with their registered addresses at 3 Temple Quay, Bristol BS1 6DZ. Curtis Banks Limited is authorised and regulated by the Financial Conduct Authority (number 492502). Curtis Banks Pensions is a trading name of Suffolk Life Pensions Limited. Suffolk Life Pensions Limited is a company registered in England & Wales (registered number 1180742) and is authorised and regulated by the Financial Conduct Authority (number 116298). Suffolk Life Annuities Limited is a company registered in England & Wales (registered number 1011674) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (number 110468). The registered address of both companies is 153 Princes Street, Ipswich, Suffolk IP1 1QJ. Tel: 0117 910 7910 Fax: 0117 929 2514. Call charges will vary. We may record and monitor calls. If you're contacting us by email, please remember not to send any personal, financial or banking information because email is not a secure method of communication. SL282.202008 August 2020