

SIPP OPPORTUNITIES WEBINAR SERIES

LEARNING OBJECTIVES

APPROVED FOR ADVISER USE | AUGUST 2020



Intergenerational planning

The fourth of our five webinars offers the chance to explore the opportunities and flexibility offered by SIPPs, covering the following learning objectives:

- To understand how the death benefits landscape has changed since 2015
- To understand how and why trusts might still be chosen as beneficiaries
- To understand the importance of beneficiaries making expressions of wishes for their inherited funds
- To understand when and how it may be possible to pass on specific assets such as commercial property

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) on our website 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. SL279.202008 August 2020