

YOUR CLIENT HAS INHERITED A PENSION – WHAT NEXT? WEBINAR LEARNING OBJECTIVES

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Your client has inherited a pension – what next?

Our “Your client has inherited a pension - what next?” webinar looks at the planning challenges that beneficiaries can face once they have received their inherited pension and the key considerations for beneficiary planning opportunities. This session covers the following learning objectives:

- Identify key factors that may affect a client’s death benefits planning
- Understand how beneficiaries may use inherited funds to increase their own pension contributions, and the tax considerations when doing so
- Understand the considerations for someone when deciding whether to access their own pension funds or an inherited plan
- Delegates will be able to explain this to a customer in a clear and concise way and be able to apply this knowledge to individual client scenarios

CPD On Demand hub

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