

THE SELF-INVESTED PENSION FOR YOU AND YOUR CLIENTS

LEARNING OBJECTIVES

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In this webinar, Barry Foster provides an insight into the investment flexibility that self-invested pensions offer and how these investment options allow clients to take advantage of investment flexibility at all stages of their pension journey.

Following this session, the delegate should have an understanding of the following objectives and/or topics:

- Gain an understanding of the investment flexibility that a self invested pension plan can offer
- Using a case study format, gain an understanding of the various investment opportunities available via a SIPP including:
 - Discretionary portfolio management
 - Commercial property
 - Unlisted securities
 - Fixed term deposits
 - Gold

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

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