

# SIPP OPPORTUNITIES WEBINAR SERIES

## LEARNING OBJECTIVES

APPROVED FOR ADVISER USE | JANUARY 2024



### 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](https://www.curtisbanks.co.uk)

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