

SIPP OPPORTUNITIES WEBINAR SERIES

LEARNING OBJECTIVES

APPROVED FOR ADVISER USE | JANUARY 2024



SIPP Opportunities webinar

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

- To understand some of the key planning opportunities in the accumulation stage of pension saving, focusing on the annual allowance and carry forward
- To understand the differences between annuities and drawdown/UFPLS and the planning opportunities of each
- To understand the potential benefits of phased withdrawal options
- To understand the planning opportunities relating to death benefits

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

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