

# THE SELF-INVESTED PENSION FOR YOU AND YOUR CLIENTS LEARNING OBJECTIVES

APPROVED FOR ADVISER USE | JANUARY 2024



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

## 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)

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 Dunn's House, St Paul's Road, Salisbury, SP2 7BF. Tel: 0370 414 7000 Fax: 0117 929 2514. 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: 0370 414 7000 Fax: 0370 414 8000. 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. SL473.202401 January 2024