



Sesame Bankhall Group

SBG NOVEMBER VIRTUAL EVENT 14 NOVEMBER 2014

CII and IFS Accredited CPD record

These sessions are designed to provide Ongoing CPD.

CPD time _____

Adviser Name _____ Firm Name _____

Date _____ Location _____

Learning outcome	Time spent	Learning outcome achieved	Plans to put into practice
	During the Forum	i.e. are you able to do what the learning outcome intended?	You can use this column to make notes on how you will use the knowledge, skills and ideas discussed in the session you attended.
09:40-10:05: Mortgage Market – SESSION 1			
By the end of the session you will be able to: <ul style="list-style-type: none"> • Understand why recent changes have been made to the Mortgage Market • Explain the changes to your customers. • Understand whether you need a specific consumer credit permission and why 	25 mins		
10:05-10:30: Specialist Lending Market – SESSION 2			
By the end of the session you will have an improved understanding of this specialist area of the market and what opportunities will exist in 2015.	25 mins		
10:30-10:55: PROVIDER SESSION – PROTECTION			
By the end of the session you will be able to explain: <ul style="list-style-type: none"> • The size and current make-up of the UK protection market • The way in which UK customers currently buy protection products • How you might increase the level of protection sales in your business 	28 mins		



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10:55-11:20: BREAK			
11:20-11:45: PROVIDER SESSION – PENSIONS			
By the end of the session you will be able to explain: <ul style="list-style-type: none">• The impact of the budget announcements on advice you give now and post April 2015• The regulators views on the advice they expect advisers to be giving both now and after April next year	25 mins		
11:45-12:15: TECHNOLOGY SESSION			
By the end of the session you will be able to explain: <ul style="list-style-type: none">• The developments with the Practice Management System during 2014• The way that technology will enhance your ability to deliver an even better investment solution that includes an in-depth analysis of existing investments• How technology helps to manage ongoing servicing• Technology developments in 2015	25 mins		