

# Financial planning seminar for professionals

## Date

Tuesday 16 October 2012

## Time

8.00am to 10.15am

## Venue

Smith & Williamson  
Portwall Place  
Portwall Lane  
Bristol  
BS1 6NA

It is our experience that many individuals, during the course of their career, often require guidance on how to maximise the return on their investments, save tax and provide for their family.

This seminar will provide an overview of the financial and taxation issues that professionals should be considering during their career.

## CPD

Please note that our seminars qualify for Continuing Professional Development (CPD) Points. Our Solicitors Regulatory Authority reference is BBU / SMWL.

## Programme

**8.00am – 8.30am**  
Registration and breakfast

**8.30am – 9.00am**  
**Partnership and personal tax issues**

- Tax changes and future developments
- Tax planning in the current political climate

Hazel Slater, Partner  
Smith & Williamson LLP

**9.00am – 9.20am**  
**Financial planning**

- Protection shortfalls and pitfalls
- Tax efficient savings

Sue Faiers, Associate Director  
Smith & Williamson Financial Services Ltd

**9.20am – 9.40am**  
**Investing for the future**

- The future of equities
- Maximising investment returns
- Alternative investments

Justin Ogilvie, Investment Manager  
Smith & Williamson Investment  
Management Limited

**9.40am – 10.05am**  
**Retirement planning**

- Benefits and tax advantages of pensions
- Pensions update

Ken Burfitt, Senior Manager  
Smith & Williamson Financial Services  
Limited

**10.05am – 10.15am**  
**Questions to the panel and Chairman's closing remarks.**

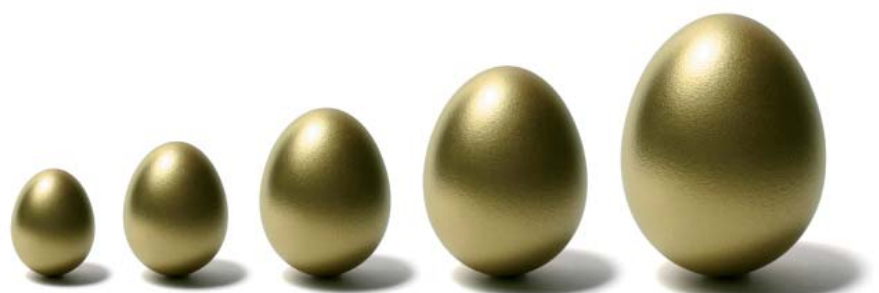
## Who should attend?

This seminar is aimed at employed or self employed professionals looking to plan efficiently and effectively for the future.

## Booking

There is no charge to attend this seminar. To book, please use the response form on the reverse or contact:

Rebecca Walford  
Tel: 0117 376 2067  
[rebecca.walford@smith.williamson.co.uk](mailto:rebecca.walford@smith.williamson.co.uk)



# Response form

## Financial planning seminar for professionals

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Please tick as appropriate

- I would be delighted to attend
- I regret that I cannot attend
- I regret that I cannot attend but would like a colleague/s to attend in my place
- I regret that I cannot attend but would like to receive details about future relevant events

Please print

Full name

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Position

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Company name

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Address

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Daytime telephone number

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Email address

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Additional delegate name(s)

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### Booking

To register, please fax back this response form to 0117 376 2004. Alternatively, please email a scanned copy to [rebecca.walford@smith.williamson.co.uk](mailto:rebecca.walford@smith.williamson.co.uk) or contact Rebecca Walford on 0117 376 2067.

Our marketing records will be updated in line with the data provided above.

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The word partner is used to refer to a member of Smith & Williamson LLP.