

# CERTIFICATE OF ATTENDANCE

**Event:** Utmost Wealth Solutions and Paraplanners Assembly

**Topic:** An in-depth analysis of post death taxation of Investment Bonds and succession planning opportunities

**Date:** 04 November 2020

**Speaker:** Steve Sayer, TEP, APFS, Chartered Financial Planner

**Learning Objectives:**

By the end of the session delegates will be able to:

- Understand chargeable events during and after the administration period
- Understand succession planning opportunities with Investment Bonds
- Discuss and explain this subject with a client in a clear and concise way
- Apply this knowledge to appropriate, individual, client scenarios.

**Total minutes: 60 minutes of CPD**

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Stephen Atkinson

Global Head of Sales and Marketing – Utmost Wealth Solutions

Your participation in this event qualifies as part of your ongoing commitment to continuing professional development should you consider its content relevant to your specific development needs. For more information about your commitment to CPD and CPD scheme rules please visit [www.thepfs.org/CPD](http://www.thepfs.org/CPD)

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