

# CERTIFICATE OF ATTENDANCE

Event: Utmost Wealth Solutions and Paraplanners Assembly

Topic: Post April 2023 Personal Tax Changes – The Case for Investment Bonds

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

Recorded Webinar

**Total minutes: 60 minutes of CPD**

Learning outcomes to understand the following:

- The impact of changes announced in the November Statement 2022 and Budget on 15 March to:
  - Income Tax
  - Capital Gains Tax
  - Corporation Tax
  - Inheritance Tax

Discuss and explain this subject with a client in a clear and concise way.

Apply this knowledge to appropriate individual, client scenarios.

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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)