

CERTIFICATE OF ATTENDANCE

Event: Utmost Wealth Solutions and Paraplanners Assembly

Topic: Succession Planning Using Loan Trusts

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

Recorded Webinar

Total minutes: 60 minutes of CPD

Learning outcomes to understand the following:

- The IHT advantages offered by, and key aspects of, a Loan Trust

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

Apply this knowledge to appropriate individual, client scenarios.



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