

CERTIFICATE OF ATTENDANCE

Event: Utmost Wealth Solutions and Paraplanners Assembly

Topic: UK taxation and Bonds including how portfolio bonds are structured

Date: 13 October 2020

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

Learning Objectives:

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

- Understand some of the main taxation issues relating to investment bonds, especially on surrender
- Discuss and explain with a client in a clear and concise way
- Apply this knowledge to appropriate, individual, client scenarios.

Total minutes: 60 minutes of CPD



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

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