



FREEDOM: Pensions – you can have it all... How it works in practice

Tuesday 24th November 2015

08:00 for 08:30– 10:00hrs

Tyneside Cinema Café Bar, 10 Pilgrim Street, Newcastle NE1 6QG

This seminar is designed build on the knowledge you have regarding the Taxation of Pensions Act 2014 introduced as a concept by George Osborne in the 2014 Budget. Whilst this is a continuation of the previous seminars on this topic, the content is equally suitable for individuals who missed the original presentations.

During this seminar, we will look at the implications of the changes and how the new rules can be put in practice. The session will be case study based and look at options for early retirement, late retirement capital extraction and income planning. We are hoping to make this session as interactive as possible, therefore if you have any particular issues that you would like to explore, please feel free to pass them to Jonathan (jonathan.bray@three-counties.co.uk) before the event.

Jonathan Bray, has over 20 years of experience within Financial Services, specialising in corporate pensions, individual pensions and tax planning as well as having a full range of financial planning knowledge. As Head of Corporate Services, his main role is to support businesses in meeting their automatic enrolment obligations together with providing a complete package of employee benefits. In addition to this role, Jonathan has responsibility for looking after private clients in all areas of financial planning, utilising his specialisms to the clients' best advantage.

Hot breakfast rolls and porridge pots will be available from 08:00 in the café bar; briefing will start 08:30 in the digital lounge on the first floor.

Tickets

No Charge

Booking

icaew.com/Northern or NorSCA.co.uk

Further information

You can find out more information, check availability and reserve your place by contacting: Alison Tait T +44 (0)131 202 1252 or E alison.tait@icaew.com

***I/we would like to attend the Freedom pensions event on Tuesday 24th November 2015**

If booking for multiple attendees please insert the lead name below with details of others - name, organisation & membership number - overleaf

Name: Organisation:

E-mail: Tel:.....

Address: Postcode:

Institute Membership No. (if applicable): I wish to reserve place(s) at the above seminar

RETURN TO: Joanne Lucking, ICAEW Northern, PO Box 101, Prudhoe NE42 9AQ