

Headlinemoney Masterclass

Wednesday 19 October 2022

America Square Conference Centre, London EC3

headline
money.co.uk

MASTERCLASSES

AGENDA

08:45 - 09:15 **Arrival & Event Registration**

09:15 – 09:20 **Introduction & welcome**
Claire Beard, Head of Content, Headlinemoney

Session 1
09:20 – 10:20 **The rise of retail investing and what's next**
Rajan Lakhani, Money Expert, Plum
A discussion on the rise of retail investment, with a focus on passive vs active, growth in investment platforms and what the future might look like.

Session 2
10:20 – 11:20 **Behind the scenes of mortgage pricing as the market moves at pace**
Jeremy Duncombe, Director of Mortgage Distribution, Yorkshire Building Society
An overview of the factors which contribute to the make-up of mortgages, the impact of the volatile economic landscape, and what this means for brokers and borrowers.

11:20 – 11:40 **Morning coffee Break**

Session 3
11:40 - 12:40 **All you need to know about tax and estate planning**
Julia Peake, Technical Specialist, Canada Life
An overview of current Inheritance tax considerations and how these are impacting people and what can be done to help negate IHT liabilities, including the uses of trusts and a brief overview of UK Trust Registration Service and trustee obligations

12:40 – 13:40 **Lunch break:** Buffet provided

Session 4
13:40 – 14:40 **Crypto: Fact, Fiction and Future**
Thomas Tudehope, Global Head of Public Policy, Luno & Sam Kopelman, Country Manager, Northern Europe, Luno
An overview of the Crypto industry looking at fact, fiction and the enormous opportunities created by this exciting, nascent technology

14:40 – 14:45 **Headlinemoney:** Closing remarks

14:45 – 15:00 **Networking coffee reception**

