Morningstar® Adviser Forum
28 March 2012, Cheltenham
Agenda

Please join us for the Adviser Forum on 28 March at the Thistle Hotel Cheltenham.
To book your place, please click here.

Reasons you should attend

- Attendance is free of charge and includes refreshments
- Collect 3.5 CPD points and gap fill credits: IFP# 129, PFS/CII# 25
- Learn how to better manage client portfolios
- Hear about the benefits and opportunities available from Closed-end Funds
- Improve a compliant investment process

09:15	**Registration and refreshments**
09:45	**Adviser Workstation Seminar** With RDR approaching, we demonstrate how to add value to your service proposition, streamline your advice process and strengthen your audit trail using Adviser Workstation. *Tarik Alalami, AWS Sales Manager, Morningstar*
10:15	**Investment Trusts: Benefits and Opportunities** Closed-end Fund Gap Fill Session Consider the compelling characteristics and portfolio-enhancing benefits of Investment Trusts and learn how to use our qualitative analysis to help you make the most educated selections. This session will give you the ability to analyse the characteristics, inherent risks, behaviours and relevant tax considerations of closed-end funds.
10:45	**Refreshments**
11:00	**How to ensure you are fully in independent** Whilst all advisers must attain Level 4 qualifications and all firms must operate adviser charging, some firms will transition to a Restricted business model whilst others decide to remain Independent. In her presentation Gill will explode some of the myths around the theory and practice of being an Independent adviser in 2013 and beyond, as well as providing practical guidance on offering an Independent advice proposition to your clients. *Gillian Cardy, Managing Director, IFA Centre*
11:45	**Refreshments and depart**

To book your place and schedule a training session, please click here.

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