



Just Equity Release Academy 3 – Advanced ER Planning – 5-27 November 2019

This CPD accredited Equity Release Academy is designed for advisers with ER1 (or equivalent qualification) who want to become more active in this market.

Packed with content, it'll allow delegates, working in small groups, to develop a client case study through fact finding research and present solutions as though to a client.

The workshop will look at advanced advice subjects such as tax planning, care planning and showing how equity release can work alongside other retirement products.

Key learning outcomes:

- Enhance your advice skills in the equity release market.
- Recognise where equity release might be appropriate through robust fact-finding and use of other tools and calculators.
- Identify and recommend client specific solutions from the fact-finding information.

CPD – 3 hours CPD is available

Dates and Venues:

5 November - Durham – Ramside Hall, Carville, Durham, DH1 1TD

6 November - Leicester – Sketchley Grange Hotel & Spa, Sketchley Lane, Hinckley, LE10 3HU

12 November - Norwich – Dunston Hall, Ipswich Road, Norwich, NR14 8PQ

13 November - Maidstone – Hilton Maidstone, Bearsted Road, Maidstone, ME145AA

19 November - London – Hilton London Tower Bridge, 5 More London Place, Tooley Street, London, SE1 2BY

20 November - Edinburgh – DoubleTree by Hilton Hotel Edinburgh Airport, Edinburgh, EH28 8LL

26 November - Winchester – Holiday Inn, Telegraph Way, Morn Hill, Winchester, SO21 1HZ

27 November - Exeter – Exeter Golf & Country Club, Topsham Road, Exeter, EX2 7AE

Attendee No's – numbers are limited to 25 per venue (35 for London)

Agenda

09:30 - Registration

10:00 – Equity Release Academy commences

13:15 – Equity Release Academy concludes and lunch served

Website / Registration page - <https://www.justadviser.com/support/additional-support/events-page/> or visit www.justadviser.com > Support > Additional Support > Events page

Contact Us - if you have any queries regarding the events please contact Events on 01737 233 315 or events@wearejust.co.uk