

Professional Adviser

27 September 2017

Adviser noticeboard: Post-it note size stuff for IFAs

Our weekly heads-up for advisers



It's Professional Adviser's weekly heads-up on events, hires and other useful bits for financial advisers ...

Quote Of The Week ...

"I do not believe in excuses. I believe in hard work as the prime solvent of life's problems."

James Cash Penney

In Case You Missed It...

Responses to the House of Commons Work and Pensions Select Committee inquiry into pension freedom [highlighted public distrust of financial advisers](#).

The [headlines of 25% provider contributions](#) and merging funding classes made the proposed FSCS changes appear a gift that would save advisers a lot of money on levies but [this is far from the case](#).

People

Wes Jones has been appointed as head of the Manchester office at **Xafinity Group**. He joins from Conduent HR Services where he was a principal & senior consulting actuary.

Kevin Doran, previously chief investment officer at Brown Shipley, has been appointed chief investment officer and managing director of **AJ Bell Investments** with immediate effect.

Lockhart Capital Management has appointed finance expert **Stuart Howard** as non-executive chairman with immediate effect.

Momentum Pensions has appointed **Heather Smyth** to the newly-created role of group legal counsel.

Tilney has appointed **Andrew Kirk** as a financial planner. He will join the company's Exeter team.

Brown Shipley has appointed **Alan Mathewson** as chief executive officer, subject to regulatory approval. He is expected to start his new role by April 2018.

Square Mile has appointed **Charles Brian Hovenden** as portfolio manager.

Tony Hicks has been appointed to the post of group sales manager at the **Beaufort Group**.

Tilney has bolstered its London office with the appointment of **Andrew Tompson**. He joins the company as a business development manager covering from London to the South Coast.

Must-Attend Events For Advisers

James Hay is hosting eight half-day pension technical masterclasses for advisers and paraplanners across the UK over the course of November. To find all the details or register for an event near you, please [click here](#)

The **CISI** and **Thomson Reuters** have teamed up to host three seminars in Edinburgh, London and Manchester. Titled 'MiFID II: Preparing for January 2018 and Beyond', the seminars will cover multiple topics including regulatory expectations under MiFID II. More information can be found [here](#)

The **Later Life Academy** is running a series of events throughout November to support advisers entering the later life market. Each 'New Horizons' event intends to help advisers understand the basics of the later life market, what opportunities are available and what 'best practice' looks like. To book onto an event, click [here](#)

AJ Bell is hosting Investival on 9 November. The event combines investment industry insights with live music and entertainment. Speakers include Mark Barnett, Andy Bell, Edward Bonham Carter and Neil Woodford. For more information, click [here](#)

Throughout November, **Parmenion** will host several regional advanced investment courses. Accredited for five hours of CPD, they are designed for those seeking a greater understanding of investment management and professional fund due diligence. Registration details and more information can be found [here](#)

TISA will host its annual conference on 21 November. This year's theme is 'Going Global: Transforming the UK into a smarter global financial centre'. Speakers include secretary of state for work and pensions David Gauke. For more details and to register, click [here](#)

On Friday 24 November **TISA** is hosting a seminar entitled 'The Decumulative Deep Dive'. Speakers include the FCA's Brian Corr on the Retirement Outcomes Review and Ray Chinn, NEST's newly appointed head of retirement options. More information can be found [here](#)

The **Social Investment Academy** is holding a seminar on social impact investing on 29 November in London. Delegates will hear from stakeholders and learn about investment opportunities and suitability issues. You can book your place [here](#)