

OVERSEAS TRUST & PENSION

International Retirement Forum 2015

Overseas Trust & Pension is pleased to be hosting the **International Retirement Forum 2015 in London** on the **16th and 17th October**. The forum is only open to financial advisers that specialise in advising clients on international retirement vehicles. These include QROPS, QNUPS and international retirement plans.

THE FORUM

The forum offers a highly focused environment and will cover a range of topics including global trends in retirement, changing regulatory landscape and the evolution of retirement products given an aging population. The Forum will also look at the challenges facing advisers who operate in this sector and different strategies for dealing with these challenges.

On the day attendees will be addressed by industry experts from the investment, life and pension sectors providing a wide range of views and insights.

The aim of the Forum is to provide an environment from which advisers can enhance their knowledge through a combination of peer to peer engagement and insights from industries that support this market.

CONTINUOUS PROFESSIONAL DEVELOPMENT

THE FORUM WILL PROVIDE ATTENDEES WITH AN OPPORTUNITY TO GAIN UP TO 6 CPD HOURS
CPD certificates will be issued.

POST FORUM NETWORKING

Attendees are **invited to join Overseas Trust & Pension at the quarter final of the Rugby World Cup 2015 at Twickenham**.

This could see South Africa playing England, Australia or Wales and will be without doubt one of the World Cup highlights.

This will be a great opportunity to network and relax whilst enjoying the superb hospitality at the Twickenham grounds, winding down from Friday's forum. Not to mention the fantastic vantage point from which to view the game.



ELIGIBILITY & QUALIFICATION

The Forum is only open to advisers who specialise in retirement and therefore qualification will be measured by way of points based on the table below. **In order to qualify an adviser has to accumulate a total of 15 points from the 1st October 2014 to 1st July 2015.**

Only the top 15 scoring advisers are guaranteed to make the final selection as places to the Forum are limited.

All advisers advising on OPES, IBIS and COPIA will automatically be eligible for the forum.

OPES INTERNATIONAL RETIREMENT PLAN

OPES Advanced	2 points
OPES Advanced Plus over £400k	3 points
OPES Advanced Plus over £750k	5 points

COPIA QNUPS

COPIA Advanced	2 points
COPIA Advanced Plus over £400k	3 points
COPIA Advanced Plus over £750k	5 points

IBIS QROPS

IBIS Advanced	1 point
IBIS Advanced Plus over £500k	2 points
IBIS Advanced Plus over £1m	3 points

FOR MORE INFORMATION

To find out more simply call your Overseas Trust & Pension representative or go to the contact section of our website www.trustandpension.com

We look forward to welcoming you in London and wish you the best of business over the coming months.

Notification: Advisers will automatically be notified of the total points accumulated on a monthly basis by email with the final list of attendees being notified in July. All notifications will be confidential and to the adviser directly.

Notice: Scoring will be based on OTAP's records only and OTAP will not enter into discussion on the results once the list of attendees is finalised. Advisers are therefore encouraged to validate their scores to ensure that there are no omissions as these cannot be amended post the list finalisation. Points will only be awarded on issued business. Any queries regarding scoring prior to the close date should be addressed to contact@overseaspension.com

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