



Financial Health Planning

Date: Friday 11 September 2020

Time: Registration from 17:15, event starts at 17:30 and ends at 21:00

Venue: Halifax Hall, Endcliffe Vale Road, Sheffield, S10 3ER

Agenda:

Time	Session	
17:15 – 17:30	Registration	
17:30 – 17:40	Introduction and outline for the evening	
	ROOM A (Dining Room)	ROOM B (Sharman Room)
17:40 – 18:00	Financial Planning Mr Christian Morris Maple Leaf Financial Services	Pension Planning Mr Greg Boyland Woolhouse Douglas Wealth Management
18:00 – 18:20	Wills, Limited Power of Attorney (LPOA) and Inheritance Tax Planning Mr Duncan Sims / Mr Patrick Mousley My Life Law	Off-plan Investing In Property Mr. Dan Varniseri Gladfish
18:20 – 18:30	Refreshment break	

Agenda continued:

Time	Session	
18:30 – 18:50	Pension Planning Mr Greg Boyland Woolhouse Douglas Wealth Management	Financial Planning Mr Christian Morris Maple Leaf Financial Services
18:50 – 19:10	Off-plan Investing In Property Mr Dan Varniseri Gladfish	Wills, Limited Power of Attorney (LPOA) and Inheritance Tax Planning Mr Duncan Sims / Mr Patrick Mousley My Life Law
19:10 – 19:20	Refreshment break	
19:20 – 19:50	My Story & Investing in a Recession Dr Prithviraj Rao WELL+H Limited	Small Self Administered Scheme (SSAS) Pensions Mr Lewis Jones The Landlord's Pension
19:50 – 20:10	CASE STUDIES 1. Reorganising my finances – Dr Ganapathy Peri 2. Value addition and equity release – Dr Sanjoy Nagaraja	CASE STUDIES 1. Buying below market value and refurbishing a property – Dr Ranganath 2. How to analyse a property deal – Miss Ananya Prasad
20:10 – 20:30	Small Self Administered Scheme (SSAS) Pensions Mr Lewis Jones The Landlord's Pension	My Story & Investing in a Recession Dr Prithviraj Rao WELL+H Limited
20:30 – 21:00	Q & A, Networking and Closing Notes	