



Financial Health Planning

Date: Wednesday 11th November 2020

Time: Event starts at 18:00 and ends at 21:00

Agenda:

Time	Session
18:00 – 18:10	Introduction and overview of programme
18:10 – 18:40	Wills, Limited Power of Attorney (LPOA) and Inheritance Tax Planning Mr Duncan Sims / Mr Patrick Mousley My Life Law – Estate Planning Specialists
18:40 – 19:00	Financial Planning Mr Christian Morris Maple Leaf Financial Services
19:00 – 19:20	Pension Planning Mr Greg Boyland Woolhouse Douglas Wealth Management
19:20 – 19:30	Break

Agenda continued:

Time	Session
19:30 – 19:50	'Hands Off' Investing In Property Mr. Dan Varniseri & Mr Ritesh Patel Gladfish Property, London
19:50 – 20:10	Various Ways of Investing in Property Dr Prithvi Rao WELL+H Limited
20:10 – 20:30	CASE STUDIES 1. How to analyse a property deal – Miss Ananya Prasad 2. Buy – Bridge – Remortgage – Dr Ranganath R
20:30 – 20:45	How can I get money? / How can I invest it? Dr Prithvi Rao WELL+H Limited
20:45 – 21:00	How to book for a 'financial health check-up' Summary of programme and close