

Retirement Conference hosted by the **FPI** in collaboration with **IRFA** and **ASSA**

Date: 27 July 2022

Duration: 08:55 – 15:45

Venue: Online via GoTo Webinar

CPD: 5.5 Verifiable CPD hours (4 Technical and 1.5 Ethics and Practice Standards)

Agenda:

Time	Topic	Speaker
08:55	Welcome	Lelané Bezuidenhout, CFP®
09:00 – 10:00	Retirement Reform – member journey from Savings to Annuity	Stephen Walker (ASSA) Ryan McCaughey, CFP® Geraldine Fowler, CFP® - Chairperson of IRFA <b>Facilitator: Lesego Mpete, RFP™ (GMI)</b>
10:00 -10:30	Benefit counselling vs financial advice	David Kop, CFP®
<b>10:30 – 10:45</b>	<b>Tea Break</b>	
10:45– 11h45	Regulatory changes: Unpacking the regulatory process and the impact this has on the member journey.	Henré Prinsloo (ASSA) Andrea Bezuidenhout (ASSA) Nancy Andrews (IRFA) Ronald King, CFP® (FPI) <b>Moderator: Lelané Bezuidenhout, CFP®</b>
11h45-12h30	Key issues that consumers battle with at retirement stage (Psychology as well as fears, bias's and real problems)	Kim Potgieter, CFP® Gugu Sidaki, CFP®
<b>12:30 – 13:00</b>	<b>Lunch</b>	
13:00 – 13:30	Globalisation and the impact on Retirement provision	Rex Cowley
13:30 – 14:15	Two pot system: A practical perspective	Andrea Bezuidenhout (Alexander Forbes) Henré Prinsloo (ASSA) Geraldine Fowler, CFP® (IRFA)
<b>14:15 – 14:30</b>	<b>Tea Break</b>	
14:30 – 15h30	Annuities	Sydney Sekese, CFP®
15h30 – 15h45	Closing	

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