

Fund5Live Roadshow - Birmingham

Tuesday 28th February 2012

The National Motorcycle Museum

09:00	09:30	Registration
09:30	09:40	Welcome Address
09:40	10:10	<p>Keynote and Chairman of the event Nick Cann, Chief Executive, <i>Institute of Financial Planning</i></p> <p>Is Independence still important? As we prepare for 2013 advisers are determining whether they are going to be Independent or Restricted. There is still a lot of confusion about what the regulator is looking for and what constitutes the best model to follow. Nick will highlight some of the current areas of confusion and outline some possible solutions to ensure excellent outcomes ahead of 2013. Will emotion outweigh pragmatism?</p>
10:10	10:30	<p>What To Do After a Poor Year? Not Every Year Can Be Vintage... Mark Harries and Simon Wood, co-manager of the SWIP Multi Manager Funds will discuss 'what to do after a poor year'. After the volatility in the markets over the last few years they will discuss why investing for the long term is essential, how fund manager experience really does count and how even for the greatest fund managers, great years can follow bad.</p> <p>Simon Wood, Investment Director, <i>Scottish Widows Investment Partnership</i></p>
10:30	10:40	Q&A
10:40	11:00	<p>Opportunities in the Investment Grade Market in 2012 The award winning Stephen Snowden examines the opportunities within the corporate bond market. He will consider the following - does size matter? And where are the returns for 2012 in this asset class?</p> <p>Stephen Snowden, Investment Manager, Fixed Income, <i>Kames Capital</i></p>
11:00	11:10	Q&A
11:10	11:30	Coffee & Networking
11:30	11:50	<p>Solving the Income Puzzle Interest rates remain at an historic low of 0.5% and the Bank of England has shown no signs that they will increase rates any time soon. This, combined with high levels of government debt, concerns over a double-dip recession, pressures on dividends and higher inflation expectations, create a challenging environment for advisers in meeting clients' income requirements.</p> <p>During this session we will look at how diversified portfolios of investments can be structured to contend with these issues and provide advisers with sustainable income solutions to meet their clients' needs. We will also discuss our solution - the S&P rated UBS Multi-Asset Income Fund.</p> <p>Helen Roughsedge, Senior Strategist, <i>UBS Global Asset Management</i></p>
11:50	12:00	Q&A
12:00	12:20	<p>UK Equities - the road ahead Fund Managers Mark Westwood and Chris Kinder will give their thoughts on the outlook for the UK and discuss how the Threadneedle UK equity team are using this macro view to shape the investment strategies employed across the desk.</p>

		<p>Mark and Chris will explain how they generate absolute returns for investors in the Threadneedle UK Absolute Alpha Fund.</p> <p>Mark Westwood, Fund Manager, UK Equities, <i>Threadneedle Investments</i></p>
12:20	12:30	Q&A
12:30	12:50	<p>Why Consider High Yield Bonds? In these times of low interest rates and inflationary pressures, high yield bonds provide a golden opportunity for investors seeking an attractive level of income.</p> <p>Mark Sanders, Credit Analyst, <i>Aberdeen Asset Management</i></p>
12:50	13:00	Q&A
13:00	14:00	Buffet Lunch & Depart