

The Thalidomide Trust

Future Money Matters 2022 (Virtual Event)

Tuesday 5 & Wednesday 6 July

To help you decide which session topics you would like to book, please view the webinar summaries in the table below:

<p>Inheritance Tax Planning (Caple Banks Wealth Management):</p> <p>This session will provide you with up-to-date information about inheritance tax planning and will include practical examples and tips to help pass on as much of your wealth as possible to your chosen beneficiaries.</p>
<p>Pensions Planning (Caple Banks Wealth Management):</p> <p>Knowing when and how to access your pensions can be a complex exercise. This session will help you understand the things you should consider when planning the most effective way to utilise your pension fund and highlight some success stories we've had with beneficiaries to date.</p>
<p>Safeguarding Gifted Assets (Caple Banks Wealth Management):</p> <p>Are you thinking of gifting an asset or cash to a relative or friend to help them out? This session will provide practical examples, things for you to consider, and explain how you can best protect 'gifted' assets such as property and cash.</p>
<p>Inflation and Trust Grants (Kevin Wesbroom – Finance Trustee)</p> <p>Inflation: what is it, how does it affect you and how are you protected?</p>
<p>Trust Investments (Kevin Wesbroom & Mark Benstead – Finance Trustees)</p> <p>Kevin and Mark will talk about the Trust's investment strategy: why and how investments are positioned; why they are important to the Trust's future income; the relationship with, and the monitoring of the fund managers; and how the investments are likely to evolve over time.</p>
<p>Trust Finances (Suzanne Lluch – Thalidomide Trust Finance Director)</p> <p>In this session, Suzanne will explain how the Trust's finances work: where the funds come from, what the agreement with Diageo says, how the investments are used to fund the grants each year, why the stock market performance has no impact on the level of grants paid, and other frequently asked questions.</p>
<p>Reducing the Risk of Financial Abuse (Jeff Prevost – Thalidomide Trust – Finance Team)</p> <p>Financial abuse is a type of abuse which involves having money or property misused or stolen, being defrauded, or being put under pressure in relation to money. It can often be subtle and hard to detect, and it can take many different forms. In this session, Jeff will outline some of the key things to look out for, and how best to protect yourself from the risk of financial abuse.</p>