



FEIFA ANNUAL CONFERENCE

22 MAY 2023, LONDON



SUPPORTING ADVISERS IN EUROPE





Delegates enjoyed a day of presentations covering areas such as ESG considerations and the risks of climate change and biodiversity, the impact of interest rates and inflation on advice and investment models, regulatory issues, expatriate solutions, the sharing of good practice and the changing nature of retirement.

And as in previous years, presenting companies included major industry names.

As always, the key decision makers from the majority of FEIFA member companies travelled from across Europe to attend the Conference



DELEGATE QUOTES

“

"Excellent - and 100% relevant as always."

"Great event, great venue, great speakers."

"Well done on content and speakers."

"Really interesting presentations, delivered beautifully."

"Thought the style of presentations was superb."

"This was the best FEIFA Conference so far."

”

“

"Thank you for all of the organisation and hard work."

"Very well organised."

”

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"Thank you so much for such a well organised event. "

"25 minute slots work very well."

”



CONFERENCE HIGHLIGHTS

FEIFA – the last 12 months

- EU regulation – Consultation submissions (8 in 2022, 13 in 2021)
- EU regulation – knowledge & competency: CPD, Qualifications
- Professional development – e-magazine, Masterclasses, Conference
- Representation
- Professional collaboration

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1. Tax deferred whilst remained invested as French compliant
2. Specifically designed for expats living in France, where their country of nationality has English as the first language
3. Gains / partial surrenders on life policies receive beneficial tax treatment
4. Revocable and irrevocable nominations available for succession planning
5. Preferential tax rates where assets are passed via a French life insurance policy
6. Wide investment options including self-select, index funds, DFM
7. Asset transfers are available as a top up, after the 10 year holding off period
8. Access to our technical expert - Krystel Gillard is a French tax lawyer
9. Simple paper based application and client onboarding

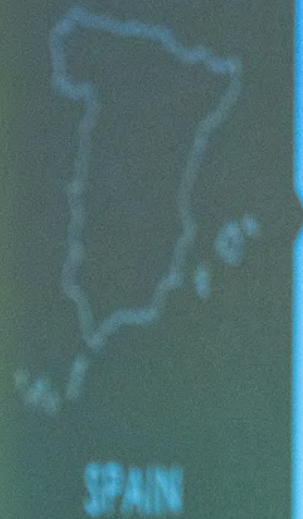


FEIFA



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2. When there is a surrender, only the gain element is subject to Spanish income tax rates (currently 19% to 28%)
4. Ultimate withhold tax of 19% and pays it to the tax authorities
5. No need to report it on 'Form 720'
6. No Spanish IBI or gift tax if the beneficiary is not Spanish resident as a resident (i.e. non Spanish resident)
7. Wide choice of companies to pick from. Switches permits
8. No 'exit tax' on moving to EU
9. Access to our in-house Spanish tax team



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Ian Kloss
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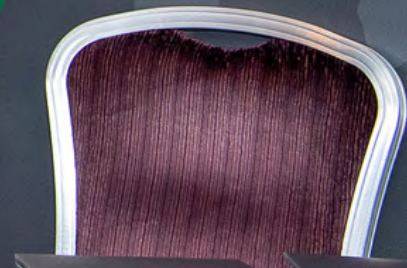
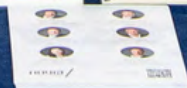
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MANAGEMENT
EXPERTISE



What does the future look like?"



Keith Richards
CEO
Consumer Duty Alliance



Bob Pain
CEO
AIO



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INDEPENDENT FINANCIAL ADVISERS







Keith Richards
Consumer Duty Alliance

Paul Pope
Consumer Duty Alliance



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Phil Billingham
Perceptive Planning

Stephen Reddaway
VAM Funds

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Veronika Tishkova
AVC Advisory





Thomas Tyl
Fichtner

Thomas Tyl
Fichtner























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