

Avoiding professional negligence from a financial perspective 2022

Thursday, 17 March 2022
13:00 - 14:00

This two-part webinar series is presented by Alison Taylor and Stephen Farnfield of the Frenkel Topping Group.

Both webinars can be viewed as part of the series, or as stand-alone session.

The first webinar will cover:

- Checking for bankruptcy and individual voluntary agreements
- Investments for minors – how they are treated in Court & alternatives
- An overview of welfare benefits and community care funding
- Personal injury trusts – their role in PI claims & timing!
- Pension loss and loss of income claims
- Accommodation claims – post Swift

Accreditation

APIL: all levels

1 CPD hour

Technical requirements

You will need access to the internet on your PC, plus audio speakers. If you do not have access to speakers you will be able to receive audio via a phone line. Further information on how to log on to the webinar will be sent via email a week before the event.



Alison Taylor

Alison Taylor was born & bred in Staffordshire. After graduating from the University of Birmingham in International Studies in 1981, she moved to Oxford, with a scholarship, to train in mental rehabilitation and Social Welfare with the Richmond Fellowship.

She is a member of the Personal Finance Society, holds their Diploma and is looking to achieve Chartered status in the near future.

Having practiced as an independent Financial Advisor (IFA) since 1983, she has specialised in the investment and protection of damages awards for the last 25 years.

Alison has been involved in many leading cases both from the investment perspective and as a Court Expert for Structured Settlements, Periodic Payment Orders and Personal Injury Trusts.



Stephen Farnfield

I have worked as an Independent Financial Adviser since 2010. Having started out in the industry as a general financial planner and investment adviser to high net worth individuals, I moved in 2012 to focus on the specialist area of advice to vulnerable people. I am currently a specialist Chartered Financial Planner and Expert Witness at Frenkel Topping.

My role is twofold, 50% is spent assisting with the legal action to secure damages and 50% is spent assisting people post-settlement to make sure their money lasts. I provide financial advice and guidance throughout the litigation process and thereafter. I assist injured parties and their legal teams to ensure they receive the appropriate level and structure of award. I joined Frenkel Topping in October 2014 to work with the most knowledgeable and well-respected firm within this specialist financial advice marketplace.

Avoiding professional negligence from a financial perspective 2022 (Part one)

1

Rate	Cost	Please tick
Single person	£65 + VAT	
Single person (Not an APIL member)	£90 + VAT	
Small office (2 to 6 delegates)	£105 + VAT	
Large office (7 or more delegates)	£160 + VAT	
Whole organisation (all staff at all offices)	£320 + VAT	

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Tel: 0115 943 5400 Email: training@apil.org.uk

Avoiding professional negligence from a financial perspective 2022 (Part two)

Thursday, 24 March 2022
13:00 - 14:00

This two-part webinar series is presented by Alison Taylor and Stephen Farnfield of the Frenkel Topping Group.

Both webinars can be viewed as part of the series, or as stand-alone session.

The second webinar will cover:

- Periodical Payment Orders – thinking outside of the box
- Matrimonial issues
- The costs of testamentary advice
- Deputyship costs
- Experts' costs
- Life after settlement – your responsibilities

Accreditation

APIL: all levels

1 CPD hour

Technical requirements

You will need access to the internet on your PC, plus audio speakers. If you do not have access to speakers you will be able to receive audio via a phone line. Further information on how to log on to the webinar will be sent via email a week before the event.



Alison Taylor

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Avoiding professional negligence from a financial perspective 2022 (Part two)

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