

PRESS RELEASE

PRINCIPAL TO GUEST SPEAK AT PFS REGIONAL MINI CONFERENCES

Principal Investment Management, the specialist private client investment manager, will be a guest speaker at five of the twelve Personal Finance Society (PFS) regional mini conferences taking place throughout September this year.

Each day-long conference will feature a mix of sessions. These will cover a wide range of subjects, from the changing shape of advice, the Retail Distribution Review and remuneration, through to challenges in the pensions market including SIPPs, new personal accounts and choices at retirement.

To open each of these five mini conferences, Principal will be giving a technical presentation on 'a strategic approach to investment'. This will include:

- Creating an investment process for clients – risk profiling, asset allocation, fund selection
- Providing an on-going service to build value in your business
- Deciding what to retain in-house and what to outsource
- Structuring the process, servicing, TCF and charging issues

Anne Gilbert, Principal's Managing Director, comments: "At Principal we pride ourselves on personal service, so it's a great honour to be speaking at the PFS regional conferences. This gives us a terrific opportunity not only to offer our own expertise and insights to the PFS members but personally to meet a large number of financial advisers and get an even closer understanding of their businesses, issues and needs."

Fay Goddard, Chief Executive of the PFS said: "We're delighted Principal has agreed to be a part of the conferences. They are a much respected organisation throughout the industry, so to have them offering their personal advice, expertise and skills is a real plus for us, and for our members."

The first PFS Regional Mini-Conference in which Principal will take part covers the Stamford/Norfolk/Essex regions taking place at Newmarket Race Course on 9th September. All regional mini conferences are free to attend for PFS members, and just £60 for non-members. For more information and a full list of the conferences please visit www.thepfs.org

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Notes to editors

Principal

Principal is a leading private client investment specialist in the South of England. Founded in 1987, they now employ around 90 people in their offices situated in Sevenoaks, London and Bath. Principal look after almost £1 billion on behalf of their clients.

Principal specialise in discretionary portfolio management for private individuals, family trusts and smaller corporate clients.

The Personal Finance Society

The Personal Finance Society is the leading professional body for financial advisers and those in related roles in the UK. With over 24,000 members, it promotes the highest standards of professionalism.

