

ADVICE MATTERS

The CPD Solution For Financial Professionals

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Welcome to the final edition of Advice Matters for 2024.

Welcome

Since we last published there has been some challenging events for the financial services sector which will mean a great deal of change for both you and your clients.

The changes to IHT especially Agricultural and Business Relief in the new Chancellors first budget caused a huge furore resulting in farmers and their families taking to the streets of Westminster to protest. We thought an article highlighting the changes, including those for pensions and non-domicile was necessary for this edition.

Our first article was also born out of a need for clarification and update as another organisation is fined for serious financial crime control inadequacies. In (Anti) Money Laundering Controls, we explain why the term Money Laundering is a misnomer in today's world as it's not really just about money anymore.

If you scroll down to our article links you will also understand why our third and final article covers the interesting and, in this case, different take on the industry's ethical stance as the last few weeks has seen an unprecedented number of individual fines for breaches or criminal activity.

And lastly may we take this opportunity to wish you a Happy Holiday time and prosperous New Year.

Seasons Greetings
The ZISHI Advice Matters Team

ApEx Standards

The learning outcomes and the ApEx Standards can be found at the end of this edition of Advice Matters

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