



TISA

leading on tax incentivised savings

Malcolm Small

TISA



# Retirement Advisory Council

---

- National Employment Savings Trust (NEST) and Auto-Enrolment
- Restriction of Tax Relief for Higher Earners
- “Age 75” rule ending?
- Huge volume of Consultations.....
- Policy lines
- 3 Seminars in 2010



# Distribution Advisory Council

---

- Retail Distribution Review (RDR)
- Focus on the landscape beyond 2012.....
- .....and potential winners and losers
- Distributor Influenced Funds Project started
- 2 Seminars in 2010 – record attendance



# Wraps and Platforms Advisory Council

---

- Discussion Paper 10/2 – CP expected in November
- Interface with RDR
- Platform to Platform Re-Registration Project: an industry 1<sup>st</sup>?
- Property Authorised Investment Funds (PAIFs)
- “Corporate Wrap”
- 2 Seminars in 2010 – now annual ev



# Other Markets

---

- Children's Savings – the end of Child Trust Funds?
- ISAs – record year
- Returning interest in stocks and shares ISAs?
- The search for new vehicles for the children's savings market?
- Discretionary Investment Management continues to grow
- Long term care – the elephant in the room