



Independent  
Association of  
Prep Schools

### R33: Retirement - Knowledge and Opportunities

**Date** Monday 5 February 2024  
**Venue** IAPS HQ, Bishop's House, Artemis Drive, Tachbrook Park, Warwick, CV34 6UD  
**Cost** IAPS members - £99

Most people will only retire once, and this course is designed to make sure you get it right. The course is delivered by an expert Independent Financial Adviser, who specialises in retirement for Headteachers. The day will cover information on the Teachers' Pension Scheme, income and expenditure in retirement, pre-retirement opportunities, annual allowance, investment planning and protecting your assets from the cost of later-life care and inheritance tax. We aim to make the sessions interactive and fun (where possible!), so there will be plenty of time for questions and even a few laughs throughout the day.

**Audience** Heads and Deputy Heads, within approx. five years of retirement, or those who have recently retired  
**Course Director & Presenter** James Bareham, Independent Financial Adviser, Bareham IFA Ltd

#### Programme: Monday 5 February 2024

Time	Activity
1000	Registration and coffee
1030	Welcome and introduction
1045	Income & Expenditure in Retirement
1130	Break
1145	Teachers' Pension Scheme
1230	Lunch
1330	Opportunities & the Dreaded Allowances
1430	Break
1445	Investments & Later-Life Care Planning
1545	Q&A/ Plenary
1600	Depart

IAPS Bishop's House, Artemis Drive, Tachbrook Park, Warwick, CV34 6UD  
e [iaps@iaps.uk](mailto:iaps@iaps.uk) t +44 (0)1926 887833 w [iaps.uk](http://iaps.uk)



Independent  
Association of  
Prep Schools

**iaps** premier partners



**Terms and conditions of cancellation:** If a delegate cancels his or her application up to and including 8 weeks prior to the date of the course, a full refund will be provided. For bookings cancelled between 8 and 6 weeks, a refund of 75% of the fee will be given. Cancellations made between 6 and 4 weeks prior to the event will receive for a 50% refund, and 25% will be refunded up to and including 2 weeks prior to the date. Thereafter, IAPS regrets that no refund can be made. We are unable to reimburse you for any expenses incurred in advance, such as travel or accommodation costs which are no longer required due to the cancellation of a course, it being changed to a remote format, or delegates cancelling due to unforeseen circumstances, e.g. travel disruption. Schools should ensure they have the relevant insurance in place to cover these costs.

IAPS reserves the right to cancel an event at any time for example, but not limited to, if the event is unsustainable to run due to a low number of attendees, venue/speaker cancellation, transport issued (e.g. rail strikes). We will do all we can to ensure our courses go ahead as planned. There may also be occasions where courses that were due to take place in person may have to take place online.

Please ensure you have read and understood our [term and conditions](#) before proceeding with your booking.

**Data Protection:** At IAPS we are committed to protecting your personal data and we want to make sure we meet GDPR standards. For information on how we retain this data, go to our [Data Retention Policy](#) and for details of how we access it go to our [Privacy Policy](#). We will continue to be in touch with you in line with our updated data policies. If you have a question about your data, want to update your details or have your data removed, contact us at [data@iaps.uk](mailto:data@iaps.uk).

**Photography:** Photographs will be taken at IAPS events and may be used for marketing purposes.

**Insurance:** IAPS regrets that it cannot accept liability for loss or damage however caused to the personal property of any person attending this or any other event organised under the auspices of the Association.

By booking a place on this course/conference, we will use your data to contact you about similar information in the future. You have the opportunity to unsubscribe from this now by contacting [courses@iaps.uk](mailto:courses@iaps.uk) or at any point subsequently that you do not wish to receive these communications by unsubscribing from the specific communication.