

# Private Client Tax Planning Update

Thursday, 1<sup>st</sup> March, 2018

**Presenter: John Bunker**

**Venue: Jury's Inn, Brighton 2.00 – 5.00 p.m. 3 hours CPD**

**Fee: £100 + VAT (£120) members £120 + VAT (£144) non members**

This course will look at the following topics and will be adapted to reflect any significant developments in the run up to the course.

- Trust Register: following the frustrating delayed introduction of TRS, what does this mean for practice?
- Do trusts in wills and settlements, and letters of wishes, need re-thinking re beneficiaries included? What about existing trusts?
- Drafting wills to maximise RNRB - one year on from introduction;
- Latest developments on BPR and APR, planning to achieve "mainly trading" and avoid "excepted assets";
- DOTAS and IHT: any developments?
- Responding to any significant private client tax changes in the November 2017 Budget and Finance Bill 2018.

**John Bunker** is a freelance lecturer and Head of Private Client Knowledge Management of Irwin Mitchell LLP. With over 25 years of experience as a solicitor specialising in wills, trusts, estate and tax planning, 20 years as a Chartered Tax Adviser, John serves on the Chartered Institute of Taxation's Succession Taxes Sub-committee (of which he becomes Chair in May 2017), HMRC's Capital Taxes Liaison Group and TACT's Private Trusts Committee. John moved in 2012 to his role, responsible for technical development and know-how, for Thomas Eggar's 100 strong Private Client team, after 23 years as a partner. This role developed within Irwin Mitchell Private Wealth to include the former Berkeley Law and Sheffield head office teams.

*Sussex Law Society Courses Application Form 'Private Client Tax Planning Update' (01/03/2018)*

**Return to: Mrs J Lacy Scott, The Old Stores, Mill Street, Falmer, BN1 9PE. Tel/Fax: 01273 674420**

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