

**Inheritance Tax Planning by Will & in Lifetime  
LIVE Webinar**

**Wednesday, 12<sup>th</sup> August, 2020**

**Presenter: John Bunker**

**1pm – 4pm**

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

Where are we now for IHT Planning, and what are the key opportunities for our clients to mitigate this tax? We will reflect on the choices before the Government ahead of the Autumn Budget, some of the proposals in Chancellor Rishi Sunak’s in-tray, and the advice we might be giving clients in the meantime to make the most of current opportunities. In this LIVE webinar John Bunker will explore:

- Where now for RNRB planning, and what this means for will drafting;
- Will Planning for spouses, including the use of Nil Rate Band discretionary trusts, and business and farm owners, whether qualifying for RNRB or not;
- Estate planning to make the most of RNRB around the £2m threshold;
- Effective use of exemptions & reliefs, and advising in the light of the OTS Review of IHT in July 2019;
- Considering other elements of the OTS review, including the potential changes to CGT uplift and the business “trading threshold”.

**John Bunker** is a freelance lecturer and Head of Knowledge Development, Tax Trusts and Estates of Irwin Mitchell Private Wealth. 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 as Chair of the Chartered Institute of Taxation’s Succession Taxes Sub-committee and on 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 ‘Inheritance Tax Planning by Will & in Lifetime Webinar’ (12/08/2019)*

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

Name of Delegate: .....

(If you are sending more than one delegate, please supply names on back of this form)

I/we enclose a cheque for £ ..... (cheques payable to “The Sussex Law Society”)

Email [jeanettelacyscott@btinternet.com](mailto:jeanettelacyscott@btinternet.com) if you wish to pay by bank transfer

Firm Name: .....

Address: .....

Post Code: ..... Telephone: .....

E-mail: .....

visit the website [www.sussex-law.co.uk](http://www.sussex-law.co.uk)

PLEASE NOTE THAT CANCELLATIONS MADE WITHIN 10 WORKING DAYS BEFORE THE DATE OF THE COURSE CANNOT BE REFUNDED