

The definitive event on taxation of landed estates

Tax Planning for Landed Estates

Why attend this conference?

Tax planning for landed estates can be a complex and challenging area. As a tax advisor you are only too aware that you need to stay abreast of the latest legislative changes and ensure that you provide the correct advice. Tolley's **Tax Planning for Landed Estates** conference offers an unrivalled panel of experts providing comprehensive and practical guidance on managing all aspects of landed estate taxation. They will share their knowledge, expertise and experiences and will also answer your questions.

This conference has been researched with practitioners from the field of private client and agricultural taxation and therefore the programme has been designed specifically to meet your needs and tackles only the issues that matter.

Subjects discussed will include:

- A case study of the income and capital gains tax issues relating to a landed estate
- Effective succession strategies for a landed estate
- Tax considerations and planning for and with chattels
- Tax implications of heritage land

Who will you meet?

The event will bring together:

- Tax Accountants
- Consultants and Financial Advisers
- Wealth Managers
- Private Client Lawyers
- Trustees and Fiduciaries
- Estate Managers

Last year's event was a sell out success; here's what our delegates had to say about it:

"A good wide update on the many possible problems for a tax practitioner acting for landed estates."

Vince Cheshire, TMF Management (UK) Ltd

"Good variety of topics covered effectively by a team of accomplished and knowledgeable speakers."

Colin McKelvie, Johnston Carmicheal

"Overall a useful update with a good variety of topics and speakers."

Nicki Shipley, Smailes Goldie

"Use of case studies added understanding to quite involved technical issues and allowed different aspects to interact with each other."

Ian Phillips, Duncan & Toplis

Interested in Agriculture Law? Why not book on our Tax Planning for Landed Estates Conference and Agriculture Law Conference and save £150

Butterworths' Agricultural Law conference chaired by **James Furber, Farrer & Co** offers a comprehensive and practical overview of the legal issues surrounding agricultural law. Featuring discussions on CAP reforms, rights of way and renewable energy schemes, this is a must attend event for anyone concerned with agricultural and property law. **Call 020 7347 3574 for more information.**

Sponsorship Opportunities

Promote your brand, showcase your expertise and meet new clients. Various sponsorship opportunities are available at this event. For more information contact **Ami Shah** on **020 7400 2501** or email ami.shah@lexisnexis.co.uk

Pre-Conference Networking

All our delegates will be able to take advantage of our pre-conference online networking. Our system, Leebug, allows you to connect with other delegates, discuss and debate the issues, set up meetings and submit questions for the panels.



Programme

Tuesday 27 March 2012

Follow us on Twitter @LNconferences

09.00 Registration and refreshments

09.30 Chairman's welcome and introduction

[Sue Laing, Partner, Boodle Hatfield](#)

09.35 Landed estates; recent case law update

- Legislative update
- Taking advantage of the opportunities
- Restructuring in light of recent case law
- Farmhouses

[Matthew Woods, Partner, Withers](#)

10.15 Taxation implications of heritage land

- Heritage property maintenance plans
- Classifying heritage land
- Exemptions and when they apply

[Penny Elliott, Partner, Forsters](#)

11.00 Question and answer panel

11.10 Morning refreshments

11.30 Succession strategies for landed estates

- Asset protection against divorce and other risks
- Tax planning for succession/mitigating IHT
- Provision for other family members
- Case study examples

[Amanda Hardy, Barrister, 15 Old Square](#)

12.10 Tax planning for chattels

- Valuation – dealing with HMRC
- Tax treatment of plant and fixtures
- Gift and lease back of chattels
- Gifts of cultural property – the new gift aid for chattels

[Wendy Philips, Senior Director, Tax and Heritage Department, Sotheby's](#)

12.50 Question and answer panel

13.00 Lunch

14.00 Case study of a Landed Estate

Examining the accounting, income and capital gains tax issues relating to a landed estate

14.40 IHT planning and landed estates

- IHT planning: APR, BPR and the scope of reliefs
- Conditional exemption
- Anti-avoidance
- Defining a farmhouse and applying the 'character test'

[Paul Harris, Partner, Smith & Williamson](#)

15.20 Question and answer panel

15.30 Afternoon refreshments

15.45 Landed Estates, VAT planning and SDLT

- VAT Treatment of income and partial exemption
- The option to tax
- Opportunities and benefits
- SDLT issues with leases
- Trusts, partnerships and connected companies

[Sara Maccallum, Partner, Boodle Hatfield](#)

16.20 Capital Gains Taxation

- Entrepreneurs Relief on farm development land
- Passing farms to the next generation
- Farm diversification
- Disposals of the full range of the elements of the farm, from small parcels to the whole enterprise

[Julie Butler, Butler & Co](#)

17.00 Chairman's closing remarks and close conference

Registration

Tax Planning for Landed Estates

Tuesday 27 March 2012

Central London

Your priority booking code is:

WEB

You will need to quote this code to claim your early booking discount*

*The early booking discounts are only available when you register by the dates stated below.

Payment details

- £449 + VAT per delegate for bookings received on or before 31 January 2012 – **SAVE £100**
- £549 + VAT per delegate for bookings after 31 January 2012
- £748 + VAT per delegate for Tax Planning for Landed Estates & Agriculture Law – **SAVE £150**
- £299 (zero VAT) documentation only

* Please note: discounts cannot be used in conjunction with one another. You will need to quote your booking code to claim your discount

- Payment by cheque made payable to LexisNexis Payment by credit card

1st delegate details

Name
Job title
Email
(Please note we may need to send you information on venue changes by email)
Tel
Additional requirements

2nd delegate details

Name
Job title
Email
(Please note we may need to send you information on venue changes by email)
Tel
Additional requirements

Address details

Company	
Address	
City	Postcode

Booking contact / invoice address

Name	
Tel	Email
Address (if different from above)	

I understand that this booking is subject to the cancellation terms set out on this registration form.

Authorised Signature _____

(all bookings must be signed)

Booking & Enquiries (please note we require written confirmation)

Tel +44 (0)20 7347 3574 Fax +44 (0)20 7347 3576

Email registrations@lexisnexis.co.uk

Post LexisNexis Conferences, Halsbury House, 35 Chancery Lane, London WC2A 1EL

www.conferencesandtraining.co.uk/landed-estates-2012

Sponsorship and exhibition opportunities

Enhance your brand and meet new clients

Take this excellent opportunity to position your organisation at the forefront of the market. This conference will provide an excellent platform to raise your organisation's profile in front of key industry participants and showcase your expertise and services as the pre-eminent organisation in the field.

To find out more about the range of opportunities available, please contact Ami Shah on 020 7400 2501 or email ami.shah@lexisnexis.co.uk

Forthcoming Events

Should you require any further information on any of the events below, please tick the appropriate box and return to LexisNexis.

- Private Client Tax: US, 22 February 2012, London
- Tax Planning for Sports and Entertainers, 22 March 2012, London
- International Tax and Trust Congress, 21-22 March 2012, Barbados
- Agriculture Law, 28 March 2012, London

For more information visit www.conferencesandtraining.com

You can still benefit from the day's event if you can't make it!

Naturally, nothing matches the experience of coming to the conference, but if you really can't make it, you can still benefit by ordering a set of course papers. Available for £299, this will give you a permanent record of the subjects covered, which you can share with your colleagues.

To order call on +44 (0)20 7347 3574 or return the booking form.



Conference papers now also available on USB stick!
Delegates will receive hard copy papers and free USB stick

Administration

VENUE
Central London

FEE
Your one-day fee includes attendance, refreshments, lunch and course documentation. Full payment, including VAT must be received prior to the conference. Please post a cheque for the full amount with your completed registration form or tick the payment by credit card box and we will call you to obtain card details. Once payment has been received a VAT invoice/receipt will be issued.

OUR CONFIRMATION OF YOUR BOOKING
All bookings will be acknowledged in writing within five working days of receipt and joining instructions (final conference details and a venue location map) will be emailed to delegates approximately two weeks before the event. Please telephone the Bookings Enquiries line immediately:
• if you have not received written acknowledgement of your booking within 7 days of sending it by fax, post or email or
• if you have not received your joining instructions five days before the event

HOTEL ACCOMMODATION
Venuehunt Ltd
Tel: 01722 500 675
Fax: 01722 500 729
Email: lexisnexis@venuehunt.co.uk
Quote the code VHLEX at the time of booking.

ADDITIONAL REQUIREMENTS
LexisNexis Conferences would like to ensure that all delegates can participate fully at our events. If you have any additional requirements, eg, wheelchair access, large print documentation or an induction loop, or if you have any particular dietary requirements please let us know on the adjacent form.

Please call me to discuss my requirements in more detail.

CERTIFICATE OF ATTENDANCE
A certificate of attendance is available on request, following your attendance at this conference, as a record of your training and development.

DOCUMENTATION SALE
Your notes will be dispatched within five working days after the event. Please call us if you do not receive your notes by two weeks after the event.

CANCELLATIONS
A refund of fees will be made only for cancellations received in writing at least 14 days before the event (less a 25% cancellation fee to cover administration costs). No refunds will be made for cancellations received within 14 days of the event and failure to attend after confirming a booking will be subject to the same terms. We regret that the transfer of a booking to another event cannot be made but a substitute delegate will be accepted at any time before the event.

This programme is correct at the time of going to press. However, we reserve the right to alter or cancel the programme due to circumstances beyond our control.

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