

Practical planning solutions  
to protect and enhance your  
clients' wealth



# Private Client Tax Planning



Thursday 15 March 2012

Central London

**Chaired by:**

David Kilshaw, Head of Private Client,  
KPMG

**Speakers:**

Susi Dunn, Senior Associate, Farrer & Co

Francesca Lagerberg, Head of Tax,  
Grant Thornton

Jeff Millington, Partner, Smith &  
Williamson Tax

Carolyn Stepler, Partner, Ernst & Young

Jo Summers, Partner, PWT Advice

Paula Tallon, Managing Director,  
Gabelle Tax

Matthew Woods, Partner, Withers

Discover the latest developments in private wealth  
structuring for your clients' including:

- The Swiss Accord and the impact on offshore disclosure
- Disguised remuneration, pensions planning, trusts and alternative structures
- Domicile, residency and inward investment to the UK
- IHT, business exit planning and succession for private clients

Supported by

**TAXATION**  
www.taxation.co.uk

[www.conferencesandtraining.com/private-client-tax](http://www.conferencesandtraining.com/private-client-tax)

# Private Client Tax Planning

## Why attend this conference?

Tightening regulation, escalating tax rates and an increasingly convoluted legislative environment have all contributed to making planning for your clients tougher than ever before.

Overcome the challenges by attending Tolley's annual **Private Client Tax Planning** conference.

Chaired by **David Kilshaw, Head of Private Client, KPMG**, and with some of the leading figures in UK wealth advisory including **Francesca Lagerberg, Head of Tax at Grant Thornton**, this is one event you cannot afford to miss! Hear about the latest developments in private client tax including:

- A review of offshore disclosure and the options for private clients after the UK-Swiss Accord
- Business exit planning and succession planning for entrepreneurs' and private clients
- Recent developments in residency and domicile, plus the fall-out from the *Gaines Cooper* judgement
- An update on the impact of the disguised remuneration legislation and the future of pension planning for HNWI
- All the latest tax planning issues for landed estates, trusts, inheritance and succession

### 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.

## Who will you meet?

This conference is specifically tailored to provide a comprehensive overview of all the latest developments in private client tax planning. The event will bring together:

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

Don't miss the opportunity to network with senior private client practitioners from across the UK and Channel Islands. Delegates at the 2011 event included representatives from **Osborne Clarke, Sayers Butterworth, Citroen Wells, Baker Tilly, UHY Hacker Young, Crowe Clark Whitehill, Lovewell Blake, UBS, Mercer & Hole, Reynolds Porter Chamberlain, RSM Tenon, Simmons Gainsford, Haslers, Rothschild Private Management and Barclays Wealth.**

### Quotes from previous private client delegates:

*"A good balance of interesting topical presentations, relevant to domestic and international policy"*

Ashley Crossley, Baker & McKenzie

*"An excellent range of topics providing a technical summary on current tax issues affecting HNWIs"*

Gill Philpott, Lambert Chapman

*"A great opportunity to consider a wide range of issues affecting private clients"*

Nicola Cotton, Dixon Wilson

*"A comprehensive update on key private client issues"*

Nigel Shaw, Garbutt & Elliott

# Practical planning solutions to protect and enhance your clients' wealth



## Programme

Thursday 15 March 2012

09.00 Registration and coffee

**09.30 Chairman's introduction**

[David Kilshaw, Head of Private Client, KPMG](#)

**09.40 Inheritance tax and succession planning**

- What the Budget and Finance Bill will have to say on IHT
- The most recent cases and why they matter
- Maximising business property relief for succession
- The best methods to mitigate IHT without setting up a headache for the future

[Francesca Lagerberg, Head of Tax, Grant Thornton](#)

**10.20 Offshore disclosure, the Swiss Accord and the LDF**

- Swiss Accord: Likely one off payment and withholding tax moving forward
- What the Swiss Accord covers and what it does not
- Interaction with the LDF and comparisons with the Swiss Accord
- The wide use of the LDF, including trusts, non-domiciled individuals and non-residents
- A review and consideration of the increase in enquiries from HMRC into the offshore structures

[Jeff Millington, Partner, Smith & Williamson Tax](#)

11.00 Networking break

**11.20 Trust planning and alternative structures for private clients**

- Impact of higher rate tax on trust planning
- Main/UK residence ownership structures
- Family Limited Partnerships, Foundations and other alternative structures

[Susi Dunn, Senior Associate, Farrer & Co](#)

**12.00 Disguised remuneration and pensions**

- Effective pension planning
- The future of EFRBs and other pension structures
- Disguised remuneration – what the rules mean in practice

**12.40 Q&A Session**

12.50 Lunch

**13.50 Inward investment to the UK**

- Holding UK investments
- Structuring a UK trade
- UK source income issues
- Non-residents vs. resident non-doms
- New commercial remittance exemption

[Jo Summers, Partner, PWT Advice](#)

**14.30 Latest developments in tax planning for Non-Domiciles**

- New developments on residency
- Changes to Non-Dom taxation
- FA 2012 provisions for the RBC, nominated income and exempt assets

[Carolyn Stepler, Partner, Ernst & Young](#)

15.10 Networking break

**15.30 Business exit planning and succession for private clients**

- Key tax considerations for exit and succession planning
- Entrepreneurs' relief – avoiding the pitfalls
- Loan notes, cash, shares and earn outs
- Restructuring a company prior to sale
- Structuring management buy outs (MBOs)

[Paula Tallon, Managing Director, Gabelle Tax](#)

**16.10 Landed estates and tax planning for chattels**

- Update on BPR and APR - recent case law
- The use of trusts and partnerships
- Heritage property
- Art and chattels - planning issues

[Matthew Woods, Partner, Withers](#)

**16.50 Q&A session**

17.00 Chairman's closing remarks and close of conference

# Registration

## Private Client Tax Planning

Thursday 15 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

- £599 + VAT per delegate for bookings before 27 January 2012  
– **SAVE £100**
- £699 + VAT per delegate for bookings after 27 January 2012
- £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 <small>(Please note we may need to send you information on venue changes by email)</small>
Tel
Additional requirements

### 2nd delegate details

Name
Job title
Email <small>(Please note we may need to send you information on venue changes by email)</small>
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](mailto:registrations@lexisnexis.co.uk)

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

[www.conferencesandtraining.com/private-client-tax](http://www.conferencesandtraining.com/private-client-tax)

### 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](mailto: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, Central London
- International Tax and Trust Congress, 21-22 March 2012, Bridgetown, Barbados
- Tax Planning for Landed Estates, 27 March 2012, Central London

For more information visit [www.conferencesandtraining.com/tax](http://www.conferencesandtraining.com/tax)

### 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](mailto: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.

If you do not wish to be kept informed by  mail  phone  fax  email of other LexisNexis products and services, please tick the box.  If you do NOT wish your mailing details to be passed on to companies approved by LexisNexis, to keep you informed of their products and services, please tick the box.

For details of our privacy policy visit our website at: [www.lexisnexis.co.uk/privacy](http://www.lexisnexis.co.uk/privacy)

© LexisNexis 2011

