CSG

COUNTY SOCIETIES GROUP

Private Client Perspectives 2024 – Navigating Legal Horizons

Thursday 14th November 2024, Online Conference

Time	Session	Speaker
1:15 pm	Registration and Networking Lounge	
1:25 pm	Welcome & Introduction	**Maddie Beresford, TWM Solicitors**
1:30 pm	**Mastering Will Drafting: Navigating Pitfalls and Minimising Risk** An enlightening session led by Professor Lesley King, who will delve into the intricacies of will drafting with a focus on avoiding common pitfalls. This session will equip attendees with essential tips to prevent negligence claims and safeguard their practice. Attendees will gain insights into robust strategies to minimise risk, ensuring that wills are drafted with precision and integrity, as well as the critical issues of assessing capacity and identifying undue influence, supported by practical examples and precedents.	**Professor Lesley King**
2:30 pm	**Navigating the Budget 2024: Implications for Private Client Practice (Part 1)** This comprehensive analysis, taking place shortly after the budget announcement, will dissect the latest developments and any substantial impact on private client practice. While the specifics are yet to be confirmed, increases in Capital Gains Tax (CGT) and Inheritance Tax (IHT) are expected; our expert speakers will provide a thorough examination of any changes, offering critical insights and strategies to adapt to the new regulatory environment. Attendees will gain a full understanding of how to navigate the evolving tax landscape, ensuring they can provide informed and strategic advice to their clients.	**Helen Forster & Evelyn Partners**
3:15 pm	Break	
3:30 pm	**Navigating the Budget 2024: Implications for Private Client Practice (Part 2)** A continuation of the session above.	**Helen Forster & Evelyn Partners**
4:15 pm	**Ensuring Precision: Assessing Mental Capacity in Private Client Practice** This session will examine the intricacies of assessing mental capacity in private client law with an insightful session led by experts in mental capacity assessments. Attendees will gain clarity on how to assess capacity, when to engage a partner for these assessments and how assessments differ for Wills and LPAs. Practical guidance will be provided on ensuring files are robust, equipping practitioners with strategies to mitigate risks and uphold integrity in their practice.	**Victoria Cook, TSF Assessments**
5:00 pm	Conference Conclusions & Feedback	

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