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 Post-Budget Landscape for Private Clients (Part 1)** Join us as expert speakers Helen Forster and Edward Emblem offer insights into the Budget's implications for private client practice. This session will provide analysis of significant policies affecting estate planning, tax obligations, and asset management. Attendees will gain insights into Inheritance Tax (IHT) pressures, particularly with regard to the Agricultural and Business Relief Reforms including understanding the proposed adjustments, as well as changes in relief for AIM shares, particularly impacting family-owned farms and businesses. Pension and Death Benefit Adjustments will be covered, as will the HMRC compliance and process changes with questions around how HMRC's increased investment in compliance might affect timeframes and intensify tax checks, aiming to ensure proper tax payment across estates.	**Helen Forster & Edward Emblem, Evelyn Partners**
3:15 pm	Break	
3:30 pm	**Navigating the Post-Budget Landscape for Private Clients (Part 2)** In our second session, we will take a deep dive into the rules affecting Non-Domiciled individuals with a focused review of the FIG regime, Overseas Workday Relief (OWR), Trust Registration Framework (TRF), and relevant schedules affecting trusts and rebasing. The session will also explore Capital Gains Tax (CGT) developments and Anti-Avoidance Measures with an update on recent CGT changes, tax avoidance announcements, and areas that remained unchanged in this budget—but could represent potential future reform. These sessions offer essential knowledge to help practitioners navigate the new policies with clarity and confidence, equipping them to offer informed, strategic advice in this evolving tax landscape.	**Helen Forster & Edward Emblem, 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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