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Recession proofing for private clients, and strategies for your firm in the current economic downturn

Thursday 26 February 2009
Central London

6.5 CPD HOURS

Chaired by:
DAVID KILSHAW
Head of Private Client Group, **KPMG LLP**

DAVID FURST
President of the ICAEW & Chairman, **Horwath Clark Whitehill LLP**

NICHOLAS HUGHES
Partner, **BDO Stoy Hayward**

ANDY SHARP
Director, **Specialist Taxation Services**

ARABELLA SAKER
Partner, **Allen & Overy LLP**

JOHN RICHES
Head of Private Client Department, **Withers LLP**

ALAN BINNINGTON
Partner, **Mourant**

ANDREW GOLDSTONE
Partner, **Mischon de Reya**

RICHARD DEW
Barrister, **Ten Old Square**

SOPHIE DWORETZSKY
Partner, **Withers LLP**

CHRISTOPHER PAGE
Partner, **Charles Russell LLP**

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- **Family limited partnerships** – the next big thing?
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Recession proofing for private clients, and strategies for your firm in the current economic downturn

Chaired by:

DAVID KILSHAW is the Tax Partner who heads KPMG's Private Client Group in London. David advises clients on all aspects of personal taxation including capital gains tax, inheritance tax and trust planning. A qualified solicitor before joining KPMG, David was a trusts and taxation partner in a leading city law firm. The combination of legal and tax experience enables him to advise clients on all aspects of capital taxation, including the use of trusts as part of a tax mitigation strategy. David comments on tax issues in the press and on TV and lectures regularly to clients and professional audiences.

Who are the speakers?

DAVID FURST is President of the Institute of Chartered Accountants in England & Wales and has been a member of its Council since 2002. David is chairman of Horwath Clark Whitehill LLP. His client work is focused on the provision of strategic and management advice to professional firms.

NICHOLAS HUGHES specialises in Trusts and Estate planning and acts for UK and non-UK domiciliaries. Now a non-practising solicitor, Nick became a partner of BDO Stoy Hayward LLP following its acquisition of Chiltern last year. Nick is a member of STEP and he lectures frequently at tax conferences.

ANDY SHARP has more than 14 years experience as an Inspector of Taxes handling cases of suspected serious fraud, avoidance and Revenue prosecutions. He was Hansard Group Leader at Liverpool Special Compliance Office, he has worked for a leading international law firm as well as a city firm, but he is currently a director of his independent tax investigations firm, Specialist Tax Services.

ARABELLA SAKER is a Partner in the Private Client Department of Allen & Overy LLP. She advises families, trust companies and banks in connection with wealth management strategies and estate/succession planning issues including trusts and other structures, family businesses, and art.

JOHN RICHES is the Head of Private Client Department at Withers LLP. He works with family offices on a cross-border basis and deals with structuring for UK residents and resident non-domiciled families.

ALAN BINNINGTON is a Mourant Partner. He is a graduate of Cambridge University, was admitted to the English Bar in 1981 and qualified as a Jersey advocate in 1984. With a background in commercial litigation he advises clients on behalf of Mourant Private Wealth assisting high net worth individuals in the structuring of their affairs.

ANDREW GOLDSTONE is a Partner at Mischon de Reya where he heads the Personal Tax and Estate Planning practice. He advises UK and overseas families and trustees on all aspects of personal tax, wills and trusts - both UK and offshore. His clients span all sectors and ages and include many high profile names.

RICHARD DEW is a Barrister practising from Ten Old Square Chambers. A significant part of his practice involves trusts and estates, including tax planning, wills, family provision and the administration of trusts. He has written and talked extensively on these subjects, and he is joint author of *Tolley's Inheritance Tax Planning 2008-09*.

SOPHIE DWORETZSKY is a Partner within the Funds Investment Tax and Trusts ('FITT') team at Withers. She advises on all aspects of sophisticated private client planning, with a focus on advising fund principals and investors, including fiduciaries, on UK tax efficient structuring of their fund investments and interests.

CHRISTOPHER PAGE heads the private capital team in Cheltenham at Charles Russell and specialises in tax and estate planning, particularly for owners of landed estates, large farms and other rural businesses. He acts for over fifty substantial estates throughout England and Wales, owned by individuals, trusts or charities.

Why attend this conference?

The type of advice private clients need has changed in the current economic downturn. This conference brings together a team of top experts who will provide their differing perspectives on the impact of all recent developments. You'll hear practical, expert guidance on a range of issues of immediate relevance to private clients such as:

- **Tax planning for private clients in the economic downturn** - how can you mitigate the risk?
- How has the **credit crunch affected private client teams**? And what are the **new opportunities**?
- When will the next **offshore facility** take place? How will it differ to the previous facility?
- Will planning - what are the practical issues arising from the **transferable nil-rate band**?
- Why are **family limited partnerships** the next big thing?
- How should you advise **non-UK domiciliaries** under the new regime?
- When are **offshore trusts** still worthwhile?
- What are the current issues for **landed estates**?

There's also a full review of the **impact of the Pre-Budget Report** – making this conference an unmissable event for all private client specialists!

Who should attend?

This is an essential event for all private client specialists, including tax advisers, lawyers, accountants, private bankers, financial advisers, trustees and wealth managers.

What delegates said about Private Client Tax Planning 2008:

"Valuable overview and thought provoking tips for the practitioner"

James Wolfson, Trident Trust Co Ltd

"Relevant in the current tax climate. All speakers were knowledgeable and insightful."

Heather Pendlebury, Tenon

PROGRAMME – Thursday 26 February 2009

09:00 Registration and coffee

09:20 **Chairman's introduction and Pre-Budget Report Review**

DAVID KILSHAW, *Head of Private Client Group,* **KPMG LLP**

09:30 **Strategies for private client teams in turbulent times**

- Impact of the "credit crunch" on different types of private client and the services they require
- How has this affected professional firms?
- The new opportunities that are emerging
- Is the UK still an attractive base for foreign nationals?
- Tax authorities - their strategies and targets
- The impact of the Legal Services Act on private client teams

DAVID FURST, *President of the ICAEW & Chairman,* **Horwath Clark Whitehill LLP**

10:15 **Will planning to mitigate inheritance tax**

- Using the nil-rate band effectively
- Transferable nil rate bands
- Residue, the surviving spouse and other beneficiaries
- Discretionary trusts and the related property rules
- Deeds of variation

NICHOLAS HUGHES, *Partner,* **BDO Stoy Hayward**

11:00 Coffee

11:20 **Compliance and enforcement**

- Co-ordination between tax authorities
- Obtaining information from offshore jurisctions
- Section 20(8A) notices and banks
- Exchange of information
- Update on the next offshore disclosure initiative

ANDY SHARP, *Director,* **Specialist Taxation Services**

12:05 **Reasons to be cheerful? Tax planning in a challenging economy**

Tax Planning for the UHNW, wealthy and affluent individuals, considering such issues as:

- Making gifts
- Setting up trusts
- Creating partnerships
- Investing for CGT rather than income tax treatment
- Spreading your family's risk

ARABELLA SAKER, *Partner,* **Allen & Overy LLP**

Panel session

12:50 **Implications for the wealth planning sector in the current financial crisis**

Q&A panel discussion looking at such issues as:

- the role of the fiduciary
- the integrity of custodial arrangements and
- implications for structured products.

JOHN RICHES, *Head of Private Client Department,* **Withers LLP**

DAVID KILSHAW, *Head of Private Client Services,* **KPMG LLP**

ALAN BINNINGTON, *Partner,* **Mourant**

13:10 Lunch

14:00 **Reviewing the new tax regime for non-UK domiciliaries**

- The £30,000 charge
- Making the nomination
- Remittance traps
- Practical aspects
- Residence issues
- Offshore companies

ANDREW GOLDSTONE, *Partner,* **Mischon de Reya**

14:45 **Tax planning using offshore trusts**

- General overview
- Review of recent developments, including the 2008 Finance Act changes
- Taxation of settlors and beneficiaries
- Planning matters

RICHARD DEW, *Barrister,* **Ten Old Square**

15:30 Tea

15:50 **Family limited partnerships (FLPs) – the next big thing**

- Background review
- Structure of UK specific FLPs
- Tax aspects
- Regulatory considerations
- Use of FLPs as flexible succession structures in other jurisdictions

SOPHIE DWORETZSKY, *Partner,* **Withers LLP**

16:30 **Current issues affecting landed estates**

- Update on APR for houses
- Traps for APR/BPR under the 2006 tax regime for trusts
- Overlap of APR and BPR
- BPR after Nelson Dance
- APR/BPR and stud-farming

CHRISTOPHER PAGE, *Partner,* **Charles Russell LLP**

17:15 **Questions & answer session**

Registration

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Private Client Tax Planning

Thursday 26 February 2009 • Central London

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☐ Tax Recession Proofing for Business

☐ Tax Planning for Landed Estates

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