Location & Date

Date: 23rd October 2018

Time: 09:00 - 16:25

Location:
Apex City Quay Hotel & Spa
1 West Victoria Dock Road
Dundee City
DD1 3JP

CPD Hours: 5hours 30minutes

This autumn join us in Dundee to hear from private client experts and meet with peers and colleagues to explore the latest developments and challenges in wills, trusts, tax and executries practice.

The programme is designed to cover a variety of relevant updates in an efficient way to ensure that you stay abreast of current awareness issues and speakers will also share reminders of more specialised practice points throughout the day.

Find out more about becoming an accredited specialist in **Incapacity and mental disability law, Private client tax or Trusts law.**

Learning outcomes

By attending this conference, you will gain:

- Insight into current developments in the law of succession
- Identify overlooked or critical obligations for professional trustees
- Consider the latest challenges and claims in the validity of wills
- Apply case studies and practical tips to the re-structure and variation of complex trusts
- Understand developments in taxation of trusts
- Opportunity to learn and discuss recent and impending changes that could impact on day to day work

Confirmed speakers

- **David McClements, Chair**, Partner, Russell + Aitken
- **Nicola Neal**, Associate, Brodies
- **Fiona McDonald**, Partner, Fyfe McDonald
- **Ian Macdonald**, Private Client Partner, Wright Johnston & Mackenzie LLP
- **Stewart Dunbar**, Associate Solicitor, Blackadders LLP
- **William Grant**, Consultant, Mitchells Roberton
- **Chris Henderson**, Chartered Financial Planner, Brewin Dolphin
- **Suzanne Thomson**, Chartered Wealth Manager, Brewin Dolphin

Testimonials

"Highly relevant to most solicitors' practices"

June 2018

"Excellent combination of variety and detail of topics. This made the full-day programme very worthwhile"

June 2018

"Chair and speakers excellent and all well versed and knowledgeable in succession planning and estate administration. Very enjoyable"

June 2018

Programme Details

09:00 - 09:30 Registration, refreshments and exhibition

09:30 - 09:45 Welcome and introduction

Speaker

***David McClements**, Partner, Russel + Aitken*

Session one — Succession and variation

09:45 - 10:30 **Wills and law of succession update**

- Insight into current developments in the law of succession

Speaker

***Fiona McDonald**, Partner, Fyfe McDonald*

Fiona McDonald is a Partner with private client firm Fyfe McDonald Solicitors. She is accredited by the Law Society of Scotland as a specialist in Private Client Tax Law. Fiona is the author of the book "Inheritance Tax in Scotland" published by Bloomsbury Professional. Fiona also co-authored the book "The Elder Client" published by W. Greens, and is an editor of the Scottish Older Client Law Review Series published by Bloomsbury Professional.

10:30 - 11:15 **Deeds of variation overview**

- Best practice and notable decisions review

Speaker

***William Grant**, Consultant, Mitchells Roberton*

William is now a full-time Consultant with Mitchells Roberton, Solicitors, Glasgow focusing mainly, but not exclusively, on Private Client work. He is a member of the Society of Trust and Estate Practitioners; a part-time tutor on the Diploma in Legal Practice at Glasgow University; a member of the Law Society of Scotland Trust and Succession sub-committee; was a member of the Advisory Group for the Scottish Law Commission Trust Review Project; and co-authored, with James Kessler QC, Drafting Trusts and Will Trusts in Scotland (2nd edn., 2018) described in its foreword by Lord Tyre as "a milestone in the expression and development of Scots trust law.

11:15 - 11:30 Refreshments, exhibition and networking

Session two — Strategies in wills and trustee obligations

11:30 - 12:15

Contentious matters in will making and executries

- Challenges to the validity of wills by disappointed beneficiaries
- Advice for will drafters to avoid successful claims by disappointed beneficiaries
- Claims by cohabitants on death

Speaker

***Nicola Neal**, Associate, Brodies*

Nicola is an Associate in Brodies' Personal & Family department. She is involved in a broad range of work within the Personal team. Nicola has a particular interest in contentious Private Client matters, including advising on challenges to the validity of wills by disappointed beneficiaries, claims by cohabitants on death and legal rights. She also has experience administering judicial factories and with actions of count, reckoning and payment. Nicola also advises on the preparation of wills, adult incapacity issues including the preparation of powers of attorney and guardianship orders, the administration of executries and trusts, and succession planning.

12:15 - 13:00

Professional trustee obligations and duties

- Lifetime and testamentary (death) trusts
- Coverage of any overlooked areas in management

Speaker

***Ian Macdonald**, Private Client Partner, Wright Johnston & Mackenzie LLP*

Ian has been Private Client Partner since 1984 to date at Wright Johnston & Mackenzie LLP, in Glasgow, Edinburgh, Dunblane and Inverness. Ian is involved in a wide range of tax and estate planning for private clients and families, including drafting wills, trusts and other structures, some for non-UK resident clients and offshore trusts; administering estates and trusts, powers of attorney and guardianships (2 current appointments as Financial Guardian), investment advice and general financial administration; advice on income tax, CGT and IHT. Ian is a regular speaker at internal and external seminars on wills, trusts and tax planning, money laundering and compliance, Family Businesses and Plain English and the Law.

13:00 - 13:45

Lunch, exhibition and networking

Session three

Trust complexities

13:45 - 14:05

Cashflow Modelling: Practical uses with clients

Speaker

***Chris Henderson**, Chartered Financial Planner, Brewin Dolphin*

A Chartered Financial Planner and Divisional Director at Brewin Dolphin. Chris has been in the financial service sector since graduating in 1998. Firstly working for the independent financial advising firm, Aitken MacDonald Ltd, who were then acquired by Brewin Dolphin Ltd in 2002. At Brewins Chris' career started as a Financial Planning Manager and he is now part of the Dundee Office management team as a Divisional Director overseeing the financial planning side in the Dundee office.

14:05 - 14:25

Practical aspects of managing trusts from an investment management perspective

Speaker

***Suzanne Thomson**, Chartered Wealth Manager, Brewin Dolphin*

Suzanne joined Brewin Dolphin as a graduate Trainee in 2006 after graduating from Dundee University with an Honours degree in Accounting and Finance. Since then, Suzanne gained professional qualifications with the CISI to become a Fellow and Chartered Wealth Manager with the CISI. She is now an Investment Manager and Assistant Director in the Dundee office where she provides a bespoke investment management service to her clients based on their individual needs and has a wealth of expertise in this area.

14:25 - 14:30 **Q&A**

14:30 - 15:15 **Taxation of trusts update**

Speaker

***Graeme Gass**, Senior Associate, Turcan Connell*

15:15 - 15:30 Refreshments, exhibition and networking

Session four The Scottish Notary Public

15:30 - 16:15 **The Scottish Notary Public**

- Understand the history and evolution of the office of Notary Public in Scotland
- Appreciate the range of functions fulfilled by Notaries Public commerce and private life in Scotland

Speaker

***Stewart Dunbar**, Associate Solicitor, Blackadders LLP*

Stewart is an Associate within the Private Client team at Blackadders, operating principally in Edinburgh after several years in Dundee, though still with active involvement in Tayside. He splits his time between (1) Wills, Powers of Attorney and succession planning, (2) Trusts and tax matters, and (3) Adults with Incapacity work including applications for guardianships and the preparation of suitability reports. Stewart tutors on the Diploma in Professional Legal Practice at the University of Edinburgh, and has previously tutored at the University of Dundee. He is also involved with the STEP Diploma, where he acts as the examiner on the Trusts module.

16:15 - 16:25 Closing remarks

Prices

prices exclude VAT

Member:	£210.42
New member:	£175.00
Accredited Paralegal:	£175.00
Trainee:	£175.00

Unemployed member:	£162.50
Non-member:	£222.92