



LONGMARK  
TAX CONFERENCES LTD

THURSDAY 9<sup>th</sup> MAY 2019

# The Annual London Private Client Tax Planning Conference

VENUE: Lord's Cricket Ground, London

## CONFERENCE SPEAKERS

Chairman and Speaker:

**Alun James**, Temple Tax Chambers

Speakers:

**Chris Whitehouse**, 5 Stone Buildings

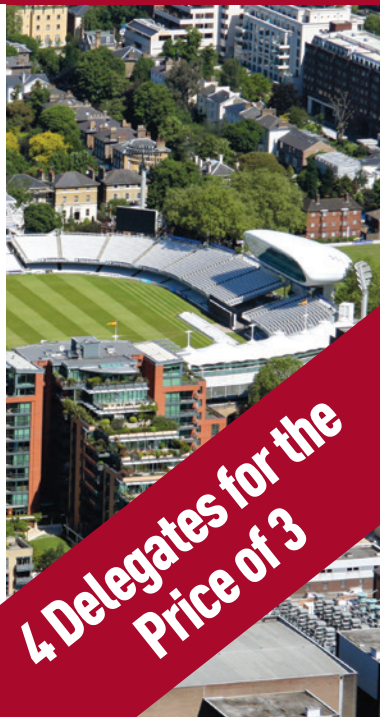
**John Woolley**, Technical Connection

**Emma Chamberlain OBE**, Pump Court Tax Chambers

## CONFERENCE TOPICS

- Capital taxes – an update
- Estate planning using financial products
- Settlements and post-death rearrangements
- Divorce and family issues
- Entrepreneurs' relief: the new provisions and an update
- Foreign tax issues

4 Delegates for the  
Price of 3



# Programme: Thursday 9th May 2019

9.00 REGISTRATION AND COFFEE

---

9.30 Chair's opening address  
ALUN JAMES

---

9.35 Capital taxes – an update

- Reforming IHT?
- The Settlement review
- The *Hood* case and reservation of benefit
- BPR update – what is an investment activity? What are excepted assets?

CHRIS WHITEHOUSE

---

10.35 COFFEE

---

10.55 Estate planning using financial products

Pensions

- Pensions – the new IHT planning solution
- How should death benefits be paid?
- Pension transfer traps
- Planning post the *Staveley* decision

Discounted gift and loan trusts

- Client benefits and practical drawbacks
- IHT & POAT technical analysis
- Planning on and after the settlor's death
- DOTAS implications

JOHN WOOLLEY

11.55 Settlements and post-death rearrangements

- The post-2006 landscape
- Avoiding entry charges
- Planning for 10-year charges
- Disclaiming benefits and the overlap between S142 and S93

CHRIS WHITEHOUSE

---

12.55 LUNCH

---

13.55 Divorce and family issues

- Update on home loan schemes
- Dividing and selling the family home – main residence relief and various changes. Case law and the limits to PPR, *McHugh* and case law update
- Transfers of property between spouses – tax issues to watch
- Setting up trusts to control the money
- Prenuptials
- Tax indemnities – a check list
- Use of experts?

EMMA CHAMBERLAIN

---

14.55 COFFEE

---

15.10 Entrepreneurs' relief: the new provisions and an update

- The recent changes – the final version
- Putting the new 5% test in context – alphabet shares, dilution and growth etc
- Other pitfalls and pointers under the new regime
- ER generally – an update

ALUN JAMES

## 16.10 Foreign tax issues

- Dealing with residence and domicile enquiries
- Requirement to correct – the aftermath – lessons to be learnt
- Practical problems for offshore trustees with UK resident beneficiaries
- Arriving in the UK
- Leaving the UK

EMMA CHAMBERLAIN

## 17.10 Chairman's closing remarks and final questions

ALUN JAMES

## 17.20 CONFERENCE CLOSE



## What recent delegates have said about our conferences...

“Consistently delivers high level and relevant content.”

Cathy Corns, Mercer & Hole

“An extremely useful course.”

Allan Holmes, Saffery Champness

“See you next year!”

Jonathan Chambers, Arnold Hill

“Very useful and entertaining conference – the speakers were all of a very high calibre and the material was very relevant for my day to day work.”

Helen Barnett, Bircham Dyson Bell

“Surprisingly managed to maintain my interest throughout and was at my technical level. Normally I find one/two sessions on areas I am not involved in. Not so this time, thank you!”

Neil Denniss, Bespoke Tax Accountants

## Pre-book your question with one of the speakers

Our conferences not only give you the chance to hear what some of the leading experts have to say, but also to put your own questions to them in advance. Our speakers are encouraged to allow time to take questions from delegates and answering interesting questions from practitioners can add to the overall experience for both speakers and delegates alike.

If you have a specific question you would like to put to one of the speakers please email your question to [info@longmark.co.uk](mailto:info@longmark.co.uk) at any point following your booking. We will then ensure that this is passed on to the relevant speaker who will deal with the question at the end of their session.

# Meet the Speakers

## ALUN JAMES

Alun James is a barrister specialising in all areas of tax and VAT. He has been advising owner-managed businesses and their owners on all aspects of their business and personal tax planning for over 20 years. He has been co-author of *Bramwell on Taxation of Companies and Company Reconstructions (Sweet & Maxwell)* since 1991. As well as his Chambers at Temple Tax Chambers, Alun is also a member of Exchange Chambers, Liverpool and Manchester.

## CHRIS WHITEHOUSE

Chris Whitehouse is a barrister practising at 5 Stone Buildings, Lincoln's Inn. He is the co-author of *Dymonds Capital Taxes* together with a number of other publications about pre-owned assets, trust planning and other capital tax issues.

## JOHN WOOLLEY

John is a director of Technical Connection, a firm who have supplied tax and technical advice within the financial services sector for the last 27 years. John has a number of legal and tax qualifications and has been involved in financial planning in the financial services sector for the last 30 years. He regularly contributes articles on tax planning to various journals as well as making guest attendances as a speaker at financial services and tax conferences. John's experience and technical knowhow have made him an invaluable first point of contact for many clients of Technical Connection.

## EMMA CHAMBERLAIN OBE

Emma Chamberlain is a barrister practising at Pump Court Tax Chambers and a fellow of the Chartered Institute of Taxation (CIOT). Emma specialises in taxation and trust advice for private clients particularly inheritance tax, capital gains tax and taxation of foreign domiciliaries.

Formerly chair of the CIOT Succession Taxes Committee and a member of the STEP Technical Committee, she received the 'outstanding achievement award' at the STEP Private Client Awards 2006. She is the co-author of *Dymonds Capital Taxes* together with a number of other publications about pre-owned assets, trust planning and other capital tax issues.

She is also co-author of Mirlees report IFS "*Wealth and Wealth Transfer taxes*" OUP 2009, an annual contributor to *Bloomsbury's Revenue Law* and writes articles on capital taxation in a number of technical journals including *Taxation*, *Private Client Business* and *British Tax Review*.



**For more information on this and forthcoming events log on to [www.longmark.co.uk](http://www.longmark.co.uk)**



**Who are we?**

**LONGMARK TAX CONFERENCES LTD.**

Registered Office: Grove House, Back Rowarth, Glossop, Derbyshire SK13 6ED

Tel: 0845 260 1057, Email: [info@longmark.co.uk](mailto:info@longmark.co.uk)

Directors: Mark Fink BA ACA CTA, Mike Longman BA FCA CTA

Co. Reg. No. 5601421



# Registration

## PAYMENT DETAILS

For payments received by 16th March 2019:

- ☐ £495 + VAT (£594) per delegate
- ☐ £1,485 + VAT (£1,782) (4 for the price of 3)

For payments received after 16th March 2019:

- ☐ £545 + VAT (£654) per delegate
- ☐ £1,635 + VAT (£1,962) (4 for the price of 3)

We are not able to issue a VAT invoice until we receive full payment and we must receive both a completed booking form and payment by 16th March to qualify for the reduced fee.

Our account details are as follows:  
**Santander UK PLC**  
**Account number: 0430 4217**  
**Sort code: 09 01 50**  
Please email the completed booking form to [info@longmark.co.uk](mailto:info@longmark.co.uk)

## DELEGATE DETAILS

### DELEGATE 1

Name: .....

Email: .....

### DELEGATE 2

Name: .....

Email: .....

### DELEGATE 3

Name: .....

Email: .....

### DELEGATE 4

Name: .....

Email: .....

## CONTACT DETAILS

Firm Name: .....

Name: .....

Position: .....

Address: .....

Town: .....

Postcode: .....

Tel: .....

Email: .....

I understand that this booking is subject to the cancellation terms set out in this brochure.

**AUTHORISED SIGNATURE:**

.....  
(All bookings must be signed)

VAT No. 869135491

# Administration

## VENUE

Lord's Cricket Ground, St John's Wood,  
London NW8 8QN

## FEE

Your fee includes attendance, refreshments, lunch and paper documentation. It is a condition of the booking that the fee is payable in advance. Once payment has been received a VAT receipt will be sent. Payment must include VAT.

## OUR CONFIRMATION OF YOUR BOOKING

All bookings will be acknowledged in writing within 21 working days of their receipt and joining instructions (final conference details and a venue location map) will be sent out to delegates approximately two weeks before the event. Please telephone immediately:

- if you have not received written acknowledgement of your booking within four weeks of sending it:
- if you have not received your joining instructions five days before the event.

## SPECIAL NEEDS

If you have any special needs or particular dietary requirements, we are happy to help where possible. Please contact us on the enquiry numbers below with details.

## CERTIFICATE OF ATTENDANCE / CPD INFORMATION

A certificate of attendance is available on request, following your attendance at this conference, as a record of your training and development. Longmark Tax Conferences are SRA accredited CPD providers (Ref: DNH LTCL). This conference carries 6 CPD hours.

## CANCELLATIONS

A refund of fees will be made only for cancellations received in writing at least 21 days before the event (less a 25% cancellation fee to cover administration costs). No refunds will be made for cancellations received within 21 days of the event and failure to attend after confirming a booking will be subject to the same terms. A substitute delegate will be accepted at any time before the event.

## DOCUMENTATION SALE

If you are unable to attend the conference but would like to purchase a set of the conference documentation (price £150 - zero VAT) please call us on **0845 260 1057** or e-mail [info@longmark.co.uk](mailto:info@longmark.co.uk). Your notes will be dispatched within 5 working days after the event.

## SPONSORSHIP OPPORTUNITIES

If you would like details of bespoke sponsorship packages for this and future conferences, which can be tailored to your company's specific requirements, please call **Mike Longman** or **Mark Fink** on **0845 260 1057** or e-mail [sponsorship@longmark.co.uk](mailto:sponsorship@longmark.co.uk).

# Booking and Enquiries

## ENQUIRIES:

Please call **0845 260 1057** or email [info@longmark.co.uk](mailto:info@longmark.co.uk)

## BOOKINGS:

If paying by cheque, please send your completed form and cheque to:

Longmark Tax Conferences Ltd, Grove House, Back Rowarth, Glossop, Derbyshire SK13 6ED