



LONGMARK
TAX CONFERENCES LTD

Thursday 4th May 2023

The London Private Client Tax Planning Conference

VENUE: Lord's Cricket Ground, London

CONFERENCE SPEAKERS

Chair and Speaker:

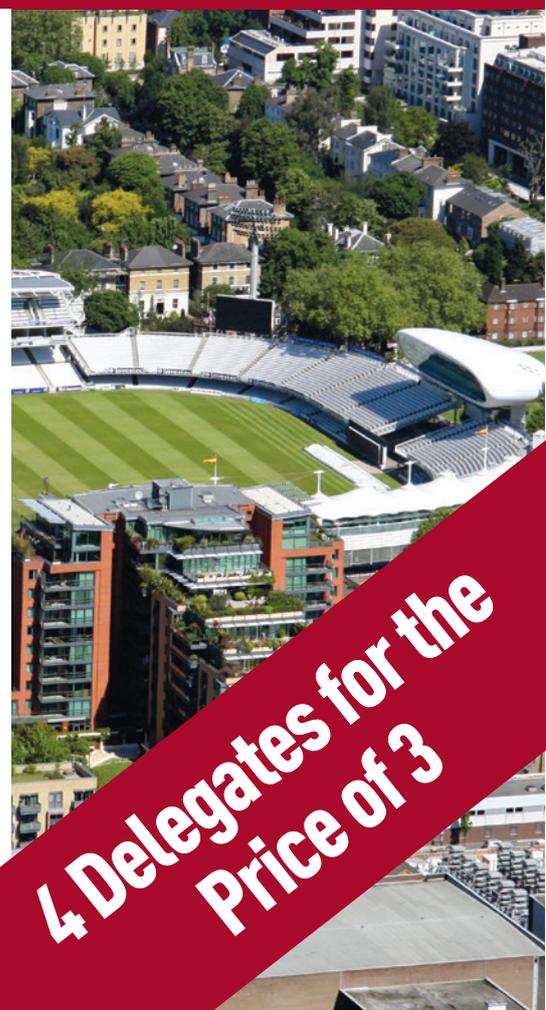
Katherine Bullock, St. Katharine's Chambers

Speakers:

- **Keith Gordon**, Temple Tax Chambers
- **Philip Simpson KC**, Old Square Tax Chambers
- **Emma Chamberlain OBE**, Pump Court Tax Chambers
- **Michael Ripley**, 11 New Square Chambers

Conference Topics:

- Tax and Residential Property in 2023: Tips and Traps
- Taking a case to the Tax Tribunal – busting the myths
- How to get money out of a pension scheme to fund the business
- Divorce and separation – a tax and trust update on matrimonial issues
- SDLT update
- Capital taxes update



**4 Delegates for the
Price of 3**

Programme: Thursday 4th May 2023

9.00 REGISTRATION AND COFFEE

9.30 Chair's opening address

KATHERINE BULLOCK

9.35 Tax and Residential Property in 2023: Tips and Traps

- Property investment: Incorporating highly geared property
- Dos and don'ts for managing the bank
- Property developers: how to secure BPR
- How to handle BPR property enquiries
- The essential Non-dom investors checklist
- Tied up in land: 'safe' IHT planning for the family home
- The overseas property register

KATHERINE BULLOCK

10.35 COFFEE

10.55 Taking a case to the Tax Tribunal – busting the myths

- Who should take a case and when should a specialist be engaged?
- 10 dos and don'ts when taking a case to the Tribunal
- What is the risk of paying HMRC's costs?
- Can a party back down at any stage?
- What happens after the Tribunal makes its decision?

KEITH GORDON

11.55 How to get money out of a pension scheme to fund the business

- Legislative framework
- Tax charges
- What can you do?
- Traps to avoid
- If the worst comes to the worst...

PHILIP SIMPSON KC

12.55 LUNCH

13.55 Divorce and separation – a tax and trust update on matrimonial issues including:

- CGT changes in the budget – implications for couples – good and bad.
- IHT issues
- Remittance issues – update on HMRC approach
- Main residence relief and divorce
- Use of trusts in protecting families

EMMA CHAMBERLAIN OBE

14.55 COFFEE

15.10 SDLT update

- Summary of recent developments in relation to SDLT
- News from the Spring Budget
- HMRC's consultation on mixed-property purchases and Multiple Dwellings Relief
- Recent tribunal and court decisions including:
 - Non-residential rates for mixed property purchases: taxpayer wins and losses
 - Multiple Dwellings Relief: when is a building "in the process of being constructed as a dwelling"?
 - Scope for the anti-avoidance rule in s.75A

MICHAEL RIPLEY

16.10 Capital taxes update

- New DOTAS guidance
- Gilts exemption – its scope and effect
- Trust register – general points
- Disabled, S71D and relevant property trusts – working out the differences and updated HMRC guidance
- Case law on BPR/APR
- Some planning on relevant property trusts

EMMA CHAMBERLAIN OBE

17.10 Chair's closing remarks and final questions

KATHERINE BULLOCK

17.20 CONFERENCE CLOSE

Pricing

For payments received by **Saturday 4th March 2023:**

£575 + VAT per delegate

£1,725 + VAT (4 for the price of 3)

For payments received after **Saturday 4th March 2023:**

£625 + VAT per delegate

£1,875 + VAT (4 for the price of 3)

**CLICK HERE
TO REGISTER**

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 online bookings will be acknowledged automatically by email 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 email acknowledgement within 24 hours of making your booking.
- 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. 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 £200 - zero VAT) please call us on **0845 260 1057** or e-mail 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.

PLEASE NOTE: This programme is correct at the time of going to press. We do, however, reserve the right to alter or cancel the programme due to circumstances beyond our control. In the event that we cancel the conference our liability is strictly limited to a refund of the fees paid directly to Longmark Tax Conferences Ltd

What recent delegates have said about our conferences...

"Great to be back face to face learning. Excellent presentations."

Sally Farrow, Larking Gowen

"Brilliant subject matter by a fantastic group of presenters."

Nick Turner, Paris Smith

"A great mix of relevant topics which complemented each other. As always I am taking away several new tax planning ideas."

Charles Owen, UHY Hacker Young

"Great to be back in person."

Fiona Hall, BDO

For more information on this and forthcoming events log on to www.longmark.co.uk

Who are we?

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