



Summary Speakers Venue

Private Client Tax Conference

5 October 2023

09:30-16:30

Add to Calendar

**Register
Now**

Presented by Emma Chamberlain CTA(Fellow), Robert Jamieson CTA(Fellow) and Sadiya Choudhury

Brought to you by the Leeds Branch

In Person Event

9.30 to 4.30 PM

We hope you can join us in-person at The Principal Hotel, York

Pricing

CIOT and ATT Members: £150

CIOT and ATT Students: £95

Non-members: £175



Course content

9.30am - Registration

10.00am to 12.45pm – Robert Jamieson **Maximising Family Wealth Through Efficient Tax Planning**

Contents:

- Children's income and gains
- Some thoughts on the settlements legislation
- Pensions - important recent modifications
- Main residence relief - meaning of 'period of ownership'
- Purchase of own shares: the multiple completion problem

- Goodwill and S165 TCGA 1992 relief
- CGT on separation and divorce
- Planning through the use of the £3,600 pension contribution limit
- Case study involving IHT planning and related settlements

12.45pm to 1.45pm – Lunch Break

1.45pm to 4.30pm – Emma Chamberlain / Sadiya Choudhury

Practical IHT planning

Contents:

- IHT planning – maximising BPR – reorganising groups to avoid some traps; giving away part of the business; property dealing vs property development; areas of controversy – money lending and the like
- APR – carbon credits; the farmhouse and let property –where does the future lie?
- Planning with the family home- co-ownership
- Normal expenditure out of income and gifts for maintenance - traps to avoid
- What to do with home loan or double trust schemes in the light of recent case law
- Family investment companies – an alternative to trusts.
- When to use will trusts

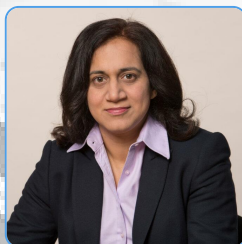
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Speakers



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