

# Private Client

Legal rights, risk, duties and contention

Alan Eccles · March 10th 2022

Virtual Seminar

PURSUE  EXCELLENCE

## Legal rights, risk, duties and contention: the current landscape for trustees and executors

Trustees and executors and their advisers face increasing scope for risk and contention. Whether it be complex assets, 'disappointment', accurately interpreting and implementing the wishes of the deceased, family structures, valuable estates or tax rules solicitors face a growing network of issues to navigate. As well as new issues, old 'friends' such as legal rights and trustee powers and duties must be carefully considered. Where contention does rise, solicitors need to be aware of the court processes involved and the remedies and actions that trustees/executors, beneficiaries and others might need wish to seek.

The seminar will look at issues including:

- risk identification and management in lifetime planning
- common sources of risk and 'disappointment'
- complex assets as such as family businesses and partnership property
- will interpretation and implementation
- executor/trustee powers, discretions and duties
- legal rights
- ongoing trusts under wills
- the range of court remedies
- the professional obligations context

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### At a glance

£180+VAT; 3hrs CPD

2–5pm

March 10th

Virtual Seminar

## Materials

Once delegates book the event, you will receive confirmation of your attendance, and a follow-up reminder email shortly before the event.

At the event, delegates will receive a comprehensive handbook covering issues raised, including any presentation material. The handbook will be provided hard copy, and these materials will be available to purchase after the event for those unable to attend.

*The event begins at 2pm. Delegate registration is open from 1:30pm*

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## The Speaker



Alan Eccles

Alan's work covers three main areas: charities, private client and parliamentary matters.

Alan's private client work covers estate planning including wills, executries, trusts and inheritance tax. He is the author of the Scotland chapter in the textbook International Succession. As part of his private client advice Alan often advises on incapacity law (powers of attorney, court appointed guardianship and other methods of managing the affairs of those less able to do so). This has involved acting in some of the leading Scottish cases on incapacity law and estate and succession planning. A regular commentator on incapacity law matters, Alan's written work has been referred to in judicial decision making. Of Alan's private client work, the Legal 500 notes that he "conveys complicated legal concepts with clarity and humour".

He was previously a member of the legal staff at the Scottish Law Commission and currently lectures at the University of Strathclyde in property, trusts and charities. Alan has also tutored private client law at the University of Glasgow.

Alan was a member of the Council of the Law Society of Scotland from 2007 to 2009 and the Society's Education and Training Committee from 2007 to 2012. He is currently a member of the Society's Charity Law and Mental Health and Disability Law Committees.

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## The venue

Due to Government guidelines and COVID-19, CCPD will be delivering its seminars online, available on desktop and mobile, to ensure that our customers continue to receive the high-quality training they've come to expect.

Please get in touch if you have any questions, and we look forward to welcoming you in person before long.

## Unable to attend?

If your diary precludes attendance at the event, the course materials will be available for purchase. Please contact us for more information.

### CCPD Training

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