CCPD TRAINING

Email: info@ccpdtraining.co.uk
Phone: 0141 314 3682

Private Client

Estate Planning and the Family Home
Alan Eccles · October 27th 2022
Virtual Seminar

PURSUE EXCELLENCE

Estate Planning and the Family Home

The family home is often the crown jewel asset. An asset that has been hard-earned and deserves careful treatment in succession and estate planning. It also an asset that has more than just a financial value and the emotional ties to a home must be recognised when protecting it and passing it down generations. Tax on houses must also be considered.

This seminar will look at estate planning issues associated with homes including:

- Asset protection
- Do "home protection trusts" work?
- Should parents gift the family home?
- Wills and protecting the family home
- Survivorship destinations- riddles, enigmas, sudoku
- Capital Gains Tax- the forgotten family home tax
- Houses and executry risks
- Sales during executries
- Beneficiary buying out another beneficiary
- Associated executry LBTT points
- Inheritance Tax and the family home
- The Residence Nil Rate Band
- Holding houses following a death
- Liferents (proper and improper) and the family home
- Ademption and accidental disinheritance
- Incapacity law and the house
- Legal rights reform and the house
- Shared ownership and IHT
- Effective care home planning

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

Book Now →

At a glance

£180+VAT; 3hrs CPD
2–5pm
October 27th
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.

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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 Sottish 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.

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.

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