

# Private Client

## Estate Planning And The Family Home

Alan Eccles · June 6th · Balmoral Hotel, Edinburgh



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## Estate Planning And The Family Home

*This popular seminar will now have additional emphasis on and time devoted to the Residence Nil Rate Band. With practical experience of it both in planning and in executry administration, the session will cover in more depth these important but complicated provisions.*

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

[Book Now →](#)

### At a glance

£180+VAT  
3hrs CPD  
2–5pm  
June 6th  
Edinburgh

## 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 1pm . Delegate registration is open from 12:30pm*



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## The Speakers



Alan Eccles

Alan is a Partner in Brodies LLP, based in Glasgow. His 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

The event will take place at the Balmoral Hotel in Edinburgh. A stone's throw from Waverley Station, it benefits from excellent transport links from Glasgow as well as wider afield.

### Balmoral Hotel

1 Princes Street  
Edinburgh  
EH2 2EQ

+44 131 556 2414

## 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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