

Grave Matters: Death Benefits

Speakers • Alan Eccles

March 29th • Radisson Blu, Glasgow

PURSUE  EXCELLENCE

Death Benefits and Post-Death Planning.

Today's practitioners can easily miss out on growth and opportunity and make mistakes when it comes to this complex area of private client law. It is easy to think about houses, cash in the bank and investments as assets that need protection and planning. However, in many cases, value contained in various death benefits is the key wealth to consider.

In addition to these important benefits, this event will also take the opportunity to look at wider post-death planning topics such as deeds of variation, loss relief issues, and other matters that crop up after a death. All of these issues can make a significant difference to who benefits, how they benefit, and the tax treatment.

Content will include:

- The opportunities and risks for the solicitor in dealing with these matters
- Pension death benefits rules
- "By-pass trusts"
- Nominations and expressions of wishes
- Death in service through employment and business
- Deeds of Variation
- Appointments from trusts within two years of death
- Ongoing will trusts issues
- Sales and losses after death: IHT points
- Capital Gains Tax post-death: traps and opportunities

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At a glance

£180+VAT
3hrs CPD; 2–5pm
March 29th
Radisson Blu
Glasgow

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 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".

The venue

The event will take place at the Radisson Blu Hotel in Glasgow. Centrally located, with excellent transport links and car parking facilities, the Radisson have a wealth of experience hosting events.

Radisson Blu

301 Argyle St
Glasgow
G2 8DL

www.radissonblu.com

0141 204 3333

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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