

# Private Client

Fundamentals of inheritance tax and estate planning

Alan Eccles · March 15th · Radisson Blu, Glasgow

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## Fundamentals of inheritance tax and estate planning

This seminar will look at the most important parts of inheritance tax and estate planning. It will cover the issues that practitioners should be aware of when advising clients. This will include lifetime planning, reporting an estate correctly and tax efficiently on death as well as post-death decision-making. As well as fundamentals, it will cover current topical issues and the inheritance tax reform agenda. The session will also look at related wills and trusts points. Beyond the law and tax, the event will also consider key questions (and traps!) in the reporting forms such as IHT400.

A seminar which will give the newer practitioner a strong grounding in the area, while keeping the experienced adviser's knowledge current.

Points and topics included will be:

- The crucial elements of inheritance tax rules
- The wills and trusts law tie in with inheritance tax planning
- Current issues in inheritance tax
- The reform agenda – Office of Tax Simplification
- Some traps in inheritance tax
- Lifetime planning
- Reporting inheritance tax on death – the IHT400
- Post-death planning opportunities

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### At a glance

£180+VAT; 3hrs CPD

2–5pm

March 15th

Glasgow

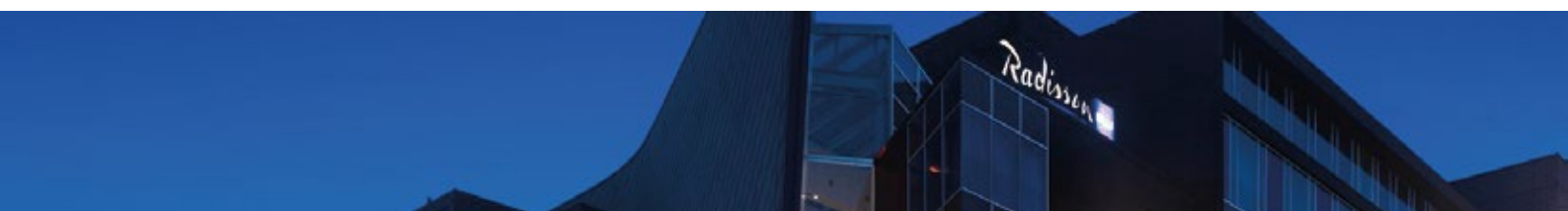
Radisson Blu

## 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 Speakers



**Tim Edward**

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 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](http://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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