

Private Client

Estate Planning and The Family Home

Alan Eccles; Rory Cowan • February 11th 2021

Virtual Seminar

PURSUE  EXCELLENCE

Estate Planning and The Family Home: A guide to protecting assets

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 is 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.

As well as issues of tax and asset protection points, the session will also consider issues for landlords.

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

- Asset protection
- Wills and protecting the family home
- Survivorship destinations- riddles, enigmas, sudoku
- Capital Gains Tax- the forgotten family home tax
- Houses and executry risks
- Inheritance Tax and the family home
- The Residence Nil Rate Band
- Private rental sector points
- The home, law, tax and coronavirus

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At a glance

£180+VAT; 3hrs CPD

2–5pm

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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 Speakers



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".



Rory Cowan

Rory Cowan is a commercial and property litigator with over 18 years of experience. He regularly appears in Sheriff Courts throughout Scotland handling a wide range of commercial and property disputes. Rory represents clients in high value commercial disputes including commercial contract disputes, corporate and partnership cases, professional negligence, insolvency, interdicts, boundary disputes and encroachment cases.

He has a proven track record dealing with commercial and other disputes often with cross border elements for European companies involving complex jurisdictional arguments and issues of 'applicable law' as well as defamation and intellectual property disputes.

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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