

# Private Client

Succession planning for business owners

Alan Eccles · April 21st 2022

Virtual Seminar

PURSUE  EXCELLENCE

## Succession planning for business owners: How to maximise and monetise your life's work

A private or family business is a hugely important asset as well as being truly 'part of the family'. Therefore, it is essential that the business, and its value, must be protected and maximised. This seminar will look at key points that you should be aware of to help families and their businesses protect family wealth. That might be to realise the value or to carefully and securely pass ownership and management across generations – be that during life or on death

The seminar will look at issues including:

- Will planning for family business owners.
- Asset protection strategies for family business succession.
- The use of trusts to control ownership.
- Transfer across generations.
- Legal issues for different types of business.
- Legal rights.
- Maximising the Inheritance tax reliefs.

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**At a glance**  
£180+VAT; 3hrs CPD  
2–5pm  
April 21st  
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 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 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

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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