

# Private Client

The Trust Registration Service extension

Alan Eccles • August 18th 2022

Virtual Seminar

PURSUE  EXCELLENCE

## The Trust Registration Service extension is here... what you need to do next?

The Trust Registration Service has been extended and new obligations fall on trustees to register trusts with HMRC when previously this would not have been necessary. This session will look at what registration means, the process involved and what private client advisers will need to be doing to ensure clients are compliant.

As well as TRS/5AMLD extension, the seminar will consider other key compliance issues for private client practitioners.

The seminar will cover the following topics;

- Trust Registration Service
- What is included and what is exempt under 5AMLD reporting
- FATCA/CRS (Common Reporting Standard)
- What do you report?
- When do you report?
- How do you report?
- Do you need to report anything or is there another process required?
- The impact on individuals, trusts and companies
- What to do with forms provided by investment managers and others

**Book Now →**

### At a glance

**£180+VAT; 3hrs CPD**

**2–5pm**

**August 18th  
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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