

# Private Client

Wills, Trusts, and Estates

Alan Eccles • May 26th 2020

Virtual Seminar

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## Wills, Trusts and Estates: best practice, identifying risk and avoiding claims

This session will provide a blueprint for best practice in wills, trusts and estates matters which will not only improve client service but also help solicitors identify and manage risk. The seminar will also recognise the challenges and risks that can stem from more complex family structures as well as wider family dynamics. The event will be of interest to all solicitors and advisers working on private client matters at all levels.

- The discussion will cover topics and issues including:-
- Likely problem areas
- The client 'journey'
- Scoping and risk
- Knowing the clients and assets: fact-finding risks and hindsight
- Will drafting risks
- Power of attorney and vulnerable client risks
- Gifting risks
- Trust drafting considerations
- Risk after a trust deed is complete and the ongoing management of the trust
- Tax risks for lawyers in estate and succession planning
- Planning ahead to deal with executry administration risk
- Particular technical risks such as accretion, survivorship destinations and charities

[Book Now →](#)

### At a glance

£180+VAT; 3hrs CPD

2–5pm

May 26th

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".

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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