CCPD TRAINING

CCPD Convention Series

Private Client

The Estate Planning and Succession Conference

CHAIR
Alan Eccles

SPEAKERS
Roddy Harrison
Norman Kennedy
Douglas McCrea
Jonathan Campbell

0930–1630
APRIL 25TH
RADISSON BLU, GLASGOW

Private Client

The Estate Planning and Succession Conference

APRIL 25TH • 0930–1630 • £180+VAT • RADISSON BLU GLASGOW

The estate planning and succession conference will give delegates an overview of key developments and opportunity to discuss thoughts and ideas in the 'private client' space.

Chaired by Alan Eccles, the event will have a genuinely inter-disciplinary feel with speakers from law (such as Roddy Harrison of BTO and Norman Kennedy of Brodies) as well as accountancy and financial planning and advice (Douglas McCrea and Jonathan Campbell of McCrea Financial Services).

The topics covered will go beyond advice for elderly clients and look proactively at the situations where the private client practitioner can add real value such as on philanthropy and charities, family business succession and stewardship, tax mitigation and inter-generational planning.

Our exclusive early bird rate of £150 will apply until December 31st. Book now to secure 6 hours' CPD and join hundreds of colleagues from all over Scotland.

The event begins at 0930. Delegate registration is open from 0900.
All CCPD Legal Convention events are fully catered. Please help us look after you by indicating any dietary requirements on the booking form.

BOOK NOW

Convention Series

FULL-DAY CONFERENCES. OVER 20 SPEAKERS.

CCPD present our inaugural Legal Convention—the premier CPD and networking event from Scotland's most innovative provider. Covering a range of legal areas, we're bringing together hundreds of delegates to listen to cutting edge expertise from industry leading experts, supported by a host of sponsors and exhibitors.

The Speakers

ALAN ECCLES PARTNER, BRODIES; CHAIR

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. A regular commentator on incapacity law matters, Alan's written work has been referred to in judicial decision making. The Legal 500 notes that he "conveys complicated legal concepts with clarity and humour".

RODDY HARRISON PARTNER, BTO SOLICITORS

Roddy is the Head of the Private Client Department at BTO Solicitors. He is "*a tax planning specialist with a solid reputation in the market*" (Chambers UK), specialising in capital tax planning for individuals and trusts. "*An energetic practitioner who makes life easier with his good sense of humour*" (Chambers UK), Roddy has considerable experience also in will and trust drafting and administration. He advises clients regularly on the best ways to mitigate future tax liabilities through capital gains and inheritance tax planning.

NORMAN KENNEDY PARTNER, BRODIES

Norman is recognised as one of Scotland's leading private client lawyers, specialising in advising high net worth individuals families in relation to succession planning, asset protection, inheritance tax mitigation, wills, trusts, executries (probate) and incapacity planning. He is the trusted legal adviser to a wide range of clients, from the relatively well off to some of Scotland's wealthiest families. As well as being a lawyer, he is a fully qualified Chartered Accountant, well known for his financial acumen and commercial approach.

The Speakers

DOUGLAS MCCREA MANAGING DIRECTOR, MCCREA FINANCIAL SERVICES

Douglas McCrea founded McCrea Financial Services in April 1999, when after many years working for leading financial institutions he recognised the need for a comprehensive yet personal service encompassing all aspects of Financial Planning. He has been an Independent Financial Adviser since 1991 and has many long-standing clients reaching as far back as the 1990's. McCrea Financial Services was recently awarded Investor in People Gold Status.

JONATHAN CAMPBELL CHARTERED FINANCIAL PARTNER, M.F.S

Jonathan Campbell is the Pension, Investment and Trust Specialist for the firm. He has a wealth of experience and knowledge relevant to his role having worked in the Financial Planning sector for the past fourteen years. He is a Chartered Financial Planner and has passed the Advanced Financial Planning examinations in his specialist areas–these being AF1 Tax and Trust Planning, AF3 Pension Planning and AF4 Investment Planning–and is a Fellow of the Personal Finance Society and an Associate of the Chartered Insurance Institute.

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MATERIALS

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.