

# Private Client

## Spring Budget 2021 and Inheritance Tax Planning

Alan Eccles, John Cairns, Andrew Reynolds • March 11th 2021

Virtual Seminar

PURSUE  EXCELLENCE

## Spring Budget 2021 and Inheritance Tax Planning

The forthcoming Budget could make changes to estate planning rules and they could be significant. The Office of Tax Simplification has reviewed both inheritance tax and capital gains tax and there has even been a Wealth Tax Commission report.

With the prospect for change this seminar is timed to get you up to speed on the estate planning landscape following the Budget. The session will cover the essentials of the rules and take account of any significant changes.

Topics covered will include:-

- Spring Budget overview for estate planning
- The essentials of inheritance tax
- Rules of gifting
- Trusts update
- Capital gains tax estate planning round-up
- Future estate planning considerations

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### At a glance

£180+VAT; 2hrs CPD

2–5pm

March 11th

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 BKF&Co

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".

### John Cairns French Duncan LLP

John trained with McLachlan & Brown before joining Price Waterhouse at the start of the 1980s as a tax senior. He moved to Arthur Andersen & Company in the same capacity two years later, before his appointment as a tax manager and, subsequently, tax partner at a constituent firm of Scott Moncrieff, where he remained for some 21 years. John was appointed head of tax in Scotland for BDO in 2006, joining French Duncan as a partner in 2014.

He specialises in advising owner-managed businesses and their owners on a wide range of tax matters, including: acquisitions and sales; reorganisations; share valuations; succession planning; shares schemes; tax efficient investments and inheritance tax planning. John has also advised charitable and not-for-profit organisations and has prepared expert witness reports covering a range of issues.

### Andrew Reynolds French Duncan LLP

Andrew has been in financial services for over eight years, and has experience in various guises advising individuals and companies how to protect and make the best use of their financial assets. His clients are a mixture of business owners, wealthy families, trusts, retirees and corporate entities.

Andrew holds a range of professional qualifications including Chartered Financial Planner, Fellow of the Personal Finance Society and Pension Transfer Specialist. He is a qualified member of the Chartered Institute of Securities and Investment and he is an affiliate member of the Society of Trust and Estate Practitioners.

## The venue

The event will take place at the The Dome,  
in Edinburgh.

### The Dome

14 George Street  
Edinburgh  
EH2 2PF

[www.thedomeedinburgh.com](http://www.thedomeedinburgh.com)

0131 624 8624

## 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

[www.ccpdtraining.co.uk](http://www.ccpdtraining.co.uk)

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