Advising the Elderly Conference 2017

- Care Act
- Funding and Asset Protection
- Lasting Powers of Attorney and the Court of Protection
- Inheritance Tax and Estate Planning
- CGT Planning
- Pensions

The Midlands
26 April 2017
Hilton Hotel, East Midlands Airport

£315 per person (including lunch)
£50 for Membership PLUS | 25% Discount for Members
All prices subject to VAT
Advising the Elderly Conference 2017

Our one day conference will look into a wide range of practical issues which will enable you to offer the best possible advice and service to your elderly clients.

9.30am Welcome by Conference Chairperson

9.35am Introduction
Jonathan Wilkey, Gwyn James Solicitors
- Demographic trends and implications
- The future of estate planning
- The role of the accountant and opportunities

9.50am Charges, Care Packages and Asset Protection
Alan Robinson, Cross Keys Associates
The Care Act has now been in place in England for two years, and its Welsh equivalent for one. There are new duties regarding the provision of services and also regarding charging, in a climate of local government austerity.
This session recaps on the charging rules, with particular reference to asset protection, and also considers some of the anomalies. We shall also look at how far the local authority can restrict its service to save money, and consider how best to challenge an attempted limitation of services, or a cut in provision.

10.40am Long Term Care, Funding and Asset Protection
Jonathan Wilkey, Gwyn James Solicitors
- Charging and financial assessments
- Deprivation of capital and local authority debt recovery procedures
- Asset protection – do’s and don’ts
- The family home
- Business assets
- Insurances and pensions
- Personal possessions
- Park and mobile homes
- Trusts
- Assets held abroad

11.30am Coffee

11.45am Estate Planning for the Middle Income Client
John Thurston
In light of recent changes, John will consider a number of IHT aspects:
- Residence nil rate band – its effect on will drafting
- The use of the family home in tax planning
- Second or holiday homes
- Preservation of nil rate bands of predeceased spouses for spouses who remarry (spouses include civil partners)
- Cohabitees – what advice can be given to them?
- IHT planning for business and farming clients

12:45pm Lunch

1.45pm Lasting Powers of Attorney and the Court of Protection
Annabel Kay, Higgs and Sons
A comprehensive overview of the types of and values in powers of attorney for both financial matters and health and welfare, who can make them and how they are made. We will look at some of the drafting tips to be aware of as well as some of the pitfalls that clients and practitioners can face when making powers of attorney.
We will also look at what happens when making powers of attorney is not an option and the role of the Court of Protection in protecting vulnerable people and their financial assets.

2.30pm Capital Gains Tax Planning for the Elderly
Russell Cockburn
This session will identify the main CGT Planning issues likely to be of relevance to the elderly client either retired or in business; covering important aspects of Entrepreneurs Relief, hold-over relief, the use of trusts, planning for transfers of non-business assets and other key CGT issues.
The session will look at some specific examples and discuss the tax risks and benefits of planning or taking no action.

3.30pm Tea

3.45pm Pensions: Financial Capacity of the Elderly and the Challenges of Advice
James Jones-Tinsley, Barnett Waddingham LLP
Advising elderly clients, partly or fully retired, brings its own set of challenges; particularly where pensions are concerned. This session will cover:
- Best practice in advising the older client on pensions and making informed choices
- The challenges in providing later life planning advice and solutions
- The new world of ‘pension freedoms’ – taking advantage of the changes
- Pensions and the March Budget 2017 – implications for the elderly

4.30pm Close of conference
CPD hours: 6

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Speakers

Russell Cockburn
Formerly an Inspector of Taxes at HMRC Russell joined the wider tax/accountancy profession in 1987 as a corporate tax manager going on to head up the business tax department of a small firm of chartered accountants. In 1989 Russell established his own specialist taxation consultancy practice. He now heads up Bluebell House Consultants LLP a tax consultancy and training partnership specialising in personal and business tax consultancy services. He has presented papers at tax conferences and seminars across the country. He also writes on tax matters for a number of well-known publications, is regular Corporation Tax correspondent for the Institute of Chartered Secretaries and is also author of several booklets on taxation matters.

Annabel Kay
Annabel is an Associate at Higgs and Sons. She qualified in 2008 and has spent her whole career working in the areas of the Court of Protection and looking after the legal needs of vulnerable children and adults. She is a full member of SFE and the Law Society, has acted as a trainer to West Mercia Police on capacity matters and advises numerous charities on care funding issues. Annabel also sits on the expert panel at the University of Worcester in the area of Dementia Studies.

Alan Robinson
Alan has recently retired from legal practice after almost 40 years. Latterly he was principal of his own legal practice, dealing mainly with the affairs of older clients. His main area of expertise is entitlement to welfare benefits. He also works in the field of community care and its funding, and was an Open University lecturer in adult and children's services. He speaks frequently to the legal profession and others on issues connected with older clients. He was formerly a Mental Health Act Commissioner. He has written several books, on housing, benefits, and mental capacity. Alan now works as a consultant, and continues to train and to write on these topics.

John Thurston

James Jones-Tinsley
James has worked in pensions since 1985 and joined Barnett Waddingham in 2015 as its Technical Specialist for self-invested pensions. James assists colleagues in both the SIPP and SSAS Practice Areas on a wide range of technical matters relating to the operation and governance of Barnett Waddingham’s self-invested pension arrangements. James is a Fellow of the Pensions Management Institute, an Associate of the Personal Finance Society and a Chartered Financial Planner. James writes extensively for trade magazines and websites and presents at both in-house and external seminars and conferences.

Jonathan Wilkey
Jonathan is a solicitor, lecturer and training consultant, and a partner in the Wye Valley and Forest of Dean firm of Gwyn James Solicitors. Jonathan specialises in the law relating to the elderly with a particular regard to asset protection, long-term funding, and equity release. He lectures nationally on these matters to solicitors, accountants and financial advisers on accredited courses, conferences and in-house training. He is a contributor to various publications including Elderly Clients: A Precedent Manual Ed Denzil Lush and Caroline Bielanska (Jordans) Elderly Client Adviser (ark Group), PS (Private Client Section – The Law Society); Professional Adviser (Incisive Media) and Mortgage Solutions (ae3media).

Date and Venue

The Midlands
26 April 2017
9.30am – 4.30pm

Hilton Hotel,
East Midlands Airport
J24 M1, Derby Road (A50)
Castle Donington
DE74 2YW (Sat Nav DE74 2SL)
Tel: 01509 674 000
www.hilton.com

Cost

£315 per person (including lunch)

25% discount for Members
A 25% discount on the total price will be given to all firms who pay an annual subscription (based upon the size of their practice) to belong to a Mercia training group. This does not include firms who buy season tickets.

For further information please contact Sarah Perry.

£50 for MembershipPLUS
If you are a MembershipPLUS firm the cost of attending this conference is £50 plus VAT per place.

All prices subject to VAT

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**Booking Form**

I would like to book places on the Advising the Elderly Conference 2017 as follows:

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