

Advising The Elderly Conference 2010

- Demographic Trends and Implications
- Probate Issues
- Asset Protection and Long Term Care Funding Issues
- Effective Wealth Protection Products
- IHT Planning Issues Affecting the Elderly
- Developing the Elder Client Service
- Tax Implications of Retiring Overseas
- Court of Protection Issues including Lasting Powers of Attorney



The Midlands

Thistle Hotel, Castle Donington, 21 April 2010

Full Day Conference £250

(including lunch) plus VAT per person

£50 for National Members 25% Discount for Local Members



Enrol online at www.mercia-group.co.uk

Advising The Elderly Conference 2010



21 April 2010 Thistle Hotel, Castle Donington

Advising the elderly client is an increasing area of practice for many firms, and the growth of this sector is likely to continue - partly due to demographic factors, and partly because of the complexity of the laws surrounding this area. 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 and Introduction by Andrew Burgess

9.35am

Demographic Trends and Implications

Jonathan Wilkey, Gwyn James Solicitors

- Population structure
- Health and social care implications
- Housing
- Income
- Elder abuse
- Elderly clients and the professions

10.05am

Probate Issues

Gill Steel, LawSkills Ltd

This session will outline the key elements of the probate process and show delegates where they can be involved in the delivery of this service and the problems they should watch out for.

- What can you do and what can't you do
- Risk management issues
- The legal issues
- Why you should seek referrals
- Alternative business structures

11.00am

Coffee

11.20am

Asset Protection and Long Term Care Funding Issues

Jonathan Wilkey, Gwyn James Solicitors

- The issues around funding health and social care
- Practical concerns to clients and their families
- Advice process and avoiding negligence claims
- Key steps in asset protection

12.10pm

Effective Wealth Protection Products

Shaun Dalton, equityCare

- Wealth preservation
- Care fees planning
- Initial care plans
- Domiciliary care funding

12.45pm

Lunch

1.45pm

IHT Planning Issues Affecting the Elderly

Andrew Burgess, Estate Tax Planning Specialist, Mercia Group Ltd

Reducing the impact of IHT on the estate is a key feature of planning for elderly clients. This session will remind participants of the key areas on which they should focus.

- Importance of encouraging lifetime planning
- Role of trusts in lifetime planning
- Transferable nil rate band – how it works and when to use it
- Making sure the nil rate band is not lost
- Outline of issues on IHT and the family home

2.45pm

Developing the Elder Client Service

Terry Jordan, Berg Kaprow Lewis

- How to define 'elderly'
- How old do **you** need to be?
- What can you sell
- What can't you sell (unless authorised)
- What we have tried at BKL
- Modern technology challenges for the elderly
- STEP initiatives

3.15pm

Tea

3.30pm

Tax Implications of Retiring Overseas

Andrew Burgess, Estate Tax Planning Specialist, Mercia Group Ltd

For some retirees, the thought of retiring to warmer climes is an attractive one. This session will outline the key tax areas which need to be considered.

- Becoming non resident in UK
- Impact of deemed domicile
- Issues to consider in the new country
- Buying property overseas
- Impact of double tax agreements

4.00pm

Court of Protection Issues including Lasting Powers of Attorney

Paul Hewitt, Withers Worldwide

- Overview of the Mental Capacity Act 2005
- Primacy of best interests
- LPAs - how, who, what and when
- LPAs - the pitfalls and alternatives
- Registration of LPAs and objections
- An overview of procedure in relation to statutory wills and lifetime gifts
- The Court's approach to statutory wills and lifetime gifts since October 2007

4.45pm

Close of Conference



Mercia is recognised by the ACCA as an approved training provider. All of our courses qualify for CPD hours as required by all UK accountancy bodies.

Enrol online at www.mercia-group.co.uk

Speakers

Andrew Burgess MA

Andrew joined Mercia in 2003 as an experienced tax lecturer and consultant. After 14 years with the Revenue, Andrew joined Neville Russell, which became Mazars following the merger in 1998. At the time of leaving he was senior tax partner in the firm and had overall responsibility for the running of the personal tax department. His expertise lies in the areas of employment taxation, investigation work, charity tax and estate tax planning.

Shaun Dalton

Shaun Dalton entered the financial services industry in May 1971 and has produced a number of financial guides including the 'equityCare Essential Guide to care fees planning.' He is the former MD and founder of national IFA businesses both in the UK and overseas. Shaun is a CII qualified care fees specialist with Chartered Financial Planners, equityCare.

Paul Hewitt

Paul is a partner in Withers' Contentious Trust and Succession group and heads the firm's Court of Protection practice and charities legacy team. Before he joined Withers in 1998, Paul was a private client lawyer in Surrey and he frequently works with lawyers around the country in relation to Court of Protection matters and estates that have become contentious. He regularly lectures to professional service firms and writes and is a co-author of Probate Disputes and Remedies (Jordan's) and Inheritance Act Claims (The Law Society).

Terry Jordan

Terry has taken a leading role in developing the elder client service offering at Berg Kaprow Lewis, a London based firm of chartered accountants and the UK200 Group firm of the year 2009. He developed his skills in the capital taxes office of the Inland Revenue before joining the capital and estate planning division of a substantial City firm. His expertise encompasses inheritance tax, wills and probate work. Terry is also expert in the legal, administrative and taxation issues that arise in trusts, both UK and overseas, and their uses in tax planning. He is the author of a number of Tolley's Tax Digests and presents at seminars on capital and estate planning.

Gill Steel

Gill Steel is a Director of LawSkills Ltd, a consultancy and training-provider to professional service firms providing help and advice on strategic planning, business focused training, IT training, client care, people issues and skills development.

Jonathan Wilkey

Jonathan is a solicitor, lecturer and training consultant who has developed a specialisation in law and the elderly, in particular with regard to community care legislation. Jonathan lectures nationally on these matters to accountants and financial advisers. He is also a regular writer and is often asked to appear on radio and television. Jonathan is currently co-editing a loose-leaf manual on law and the elderly for accountants.

Venue & Timings

Thistle Hotel, East Midlands Airport
Castle Donington Derby DE74 2SH
Tel: 0871 376 9015

21 April 2010 9.30am - 4.45pm

25% discount for Local 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 Moore.

£50 for National Members

If you have recently enrolled as a National Member firm the cost of attending this conference is £50 per place.

Booking Form

I would like to book places on the Advising The Elderly Conference in Castle Donington on 21 April 2010 as follows:

A total of _____ places @ £250	£	
Less 25% discount for Local Members	£	
A total of _____ places @ £50 for National Members	£	
Sub total	£	
Plus VAT at 17.5%	£	
TOTAL	£	

Contact name

Name of firm

Address

Postcode

Telephone

Email

Please invoice my firm. I understand the usual 28 day credit terms apply

I enclose a cheque for £ _____ made payable to Mercia Group Limited

I would like to receive more information about National/Local membership

Confirmation: An email confirming your booking will be sent to our enrolment or main contact. Joining instructions will be sent by email 10 days before the date of the event you are booked on to. Cancellations: No refund will be made where cancellation is received less than 14 days before the date of the course. All other cancellations will be subject to a £25 administration charge. All cancellations must be in writing.



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