

Private Client Conference



Wednesday, 25th September

Bristol Law Society's Annual Private Client Conference, is proud to present a wide range of speakers covering topical issues from legal and tax updates, through current planning ideas, to how to work with families in resolving their issues.



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9.30 am - 5.00 pm

Burgess Salmon LLP, One Glass Wharf, Bristol

Cost

£100 + VAT members
£150 + VAT non-members

CPD

5.5 hours

Accreditation

BSB and SRA

9.00 - 9.30 am	Registration and refreshments
9.30 - 9.45 am	Introduction by Chair <i>Michael Westbrook, Associate, Burges Salmon LLP</i>
9.45 - 10.30 am	Planning and pension death benefits <i>Michael Greenwood, Towry</i>
10.30 - 11.15 am	Contentious probate update <i>Alex Troup, Barrister, St John's Chambers</i>
11.15 - 11.30 am	Refreshments
11.30 - 12.15 am	Trusts update <i>Penelope Reed QC, 5 Stone Buildings</i>
12.15 - 1.00 pm	Estate planning and asset protection – gifts, trusts and beyond <i>Jim Aveline and Michael Westbrook, Burges Salmon LLP</i>
1.00 - 2.00 pm	Lunch
2.00 - 2.45 pm	Professional negligence in wills and trusts <i>Richard Dew, Barrister, Ten Old Square Chambers</i>
2.45 - 3.30 pm	Top tax issues for the private client practitioner <i>Richard Cartwright, Saffery Champness</i>
3.30 - 3.45 pm	Refreshments
3.45 - 4.30 pm	Rectification of wills and deeds <i>Philip Jenkins, Barrister, St John's Chambers</i>
4.30 - 5.15 pm	Conflict and family wealth: a multi-disciplinary approach <i>Nicola Jones, Family Wealth Mediation</i>
5.15 pm	Q & A Session

**Penelope Reed QC, Call 1983 QC 2009
Five Stone Buildings**

Penelope Reed QC has a wide Chancery practice with special emphasis on trusts, wills, contentious probate, family provision claims and tax, both in the UK and overseas. She is recommended by all the leading directories as a "redoubtable foe", and praised for her mastery of contentious probate, trusts and capital tax matters. She is an accredited mediator, a member of STEP, ACTAPS and the Chancery Bar Association and lectures and publishes widely on all areas of her expertise.



**Richard Dew, Call 1999
Ten Old Square Chambers**

Richard Dew's practice is focussed on wills, estates and trusts and related professional negligence. His practice is predominantly litigation, and he is frequently involved in large and complex claims. He also advises and represents in Court of Protection matters and provides expert advice in respect of tax and tax planning (principally capital taxation). Chambers and Partners describe him as a "'superb junior,' who combines strong academic credentials ... with a flair for litigation and ADR."



**Alex Troup, Call 1998
St John's Chambers**

Alex practises in the chancery and commercial fields with a particularly strong expertise in property and probate matters. He has extensive experience of both advisory and contentious work relating to wills, trusts and the administration of estates, including claims under the Inheritance Act 1975. " 'Alex is star of probates' and valued for his 'ability to reach the crux of a problem quickly.' He is also 'particularly imaginative in his suggestions for reaching compromise.' In court, he is admired for his 'concise style' which is 'blunt and to the point.' " Chambers UK (2012).



**Jim Aveline, Partner
Burgess Salmon LLP**

Jim Aveline joined Burgess Salmon in 2002 and became a partner in 2012. Jim's practice area is very broad and includes work for both UK and offshore clients. A large proportion of his time is spent advising landed estates on their various tax and trust issues, which often have an agricultural focus. He also specialises in wills, estate and trust planning for high net worth individuals and Family Office clients and has a particular focus on succession planning and structuring for business owners, often through partnerships. He also advises on transactional tax work using CGT, Entrepreneur's Relief and technical probates often with an international focus. Jim is a prize winning member of the Society of Trust and Estate Practitioners (STEP) and sits on the Law Society's Capital Taxes Sub-committee.



Michael Westbrook, Associate Burgess Salmon LLP

Michael Westbrook joined Burgess Salmon in 2010 and was made an Associate in November 2011, having previously qualified as a solicitor in July 2008 with a leading regional firm with offices in Wiltshire and Hampshire. He specialises in a broad range of areas but has a particular focus on tax and estate planning and asset protection for owners of landed estates, farmers and entrepreneurs. In addition to this, Michael also advises personal representatives on the administration of high value, complex and cross-border estates. Michael is a full member of STEP and a sits on the Council of the Bristol Law Society.



Philip Jenkins, Call 2003 St John's Chambers

Philip joined St John's Chambers from a London set in 2009. His practice encompasses the full range of chancery and related commercial fields and his time is divided between advising, drafting (non-contentious and contentious) and litigating. He has particular expertise in real property matters (including trusts of land and mortgages), wills, probate and the administration of trusts and estates (including family provision), partnership disputes, personal insolvency, and landlord and tenant (business, agricultural and residential).



Michael Greenwood Towry

Michael is a specialist in the Towry Advice Policy Team and is an experienced financial planning practitioner. Prior to joining Towry, Michael was the Tax and Trusts Manager at Clerical Medical/HBOS Group, responsible for the group's trust and estate planning propositions. He is a member of STEP and is a Chartered Financial Planner.



Nicola Jones, Mediator Family Wealth Mediation

Nicola worked as a solicitor in the UK and Bermuda for 20 years and became an associate of the Chartered Institute of Taxation in 1989. From 2004, Nicola began her work with human systems, communication and learning processes. Nicola is a family wealth mediator, an adviser to families in family businesses, a relationship adviser and professional trainer. She gained an MA in Critical Studies in 2008 and trained in relationship systems theories. She is a director of the Schumacher Institute for Sustainable Systems in Bristol and runs her business: Family Wealth Mediation. Nicola speaks and writes on subjects ranging from the Economic Empowerment of Women, Social Issues of Climate Change, Governance in Family Business and Families of Wealth and Global Philanthropy.



Richard Cartwright Saffery Champness

Richard heads up the Bristol office's Private Wealth and Estates Group and is responsible for the delivery of tax services to all local clients. He acts for an eclectic mix of clients, which include wealthy individuals, families and trustees who own and manage rural landed estates, senior executives of national/international companies, professional partnerships and more traditional owner-managed businesses. Richard speaks at events hosted by the Country Land & Business Association (CLA) addressing Capital Gains Tax (CGT), Inheritance Tax (IHT) and the use of trusts with regard to agricultural and rural businesses and their owners. He is also a regular speaker at seminars and events held by other professional advisers.



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Booking Information



Booking information

Please be advised that places are limited so please book early to guarantee a place.

Cost

Delegate fee: £100 + VAT for Bristol Law Society Members and
£150 + VAT for non members

The fee for this seminar includes the full conference pack and refreshments.

Booking Form

Please print/photocopy the booking form and either:

Email events@bristollawsociety.com

Fax your completed booking form to 0117 945 0860

Post your completed registration form to: The Law Library, The Law Courts, Small Street, Bristol BS1 1DA DX 78111.

Please send a cheque with this form or tick the box if you wish to be invoiced.
Cheques are to be made payable to Bristol Law Society.

Terms and Conditions

Payment: All invoices for this seminar must be paid within 30 days of the invoice date.

Cancellation: Any cancellations received with less than 48 hours' notice will not be entitled to a refund. This is to cover catering and administrative costs related to the seminar.

Confirmation of registration: If you have not received confirmation of your registration one week before the conference, please telephone 0117 976 3087 to confirm that your registration form has been received.

Substitute delegates: Substitute delegates will be accepted at any time – please telephone 0117 976 3087 to let us know the name of the substitute.

If you have any enquiries, please call 0117 976 3087 or email events@bristollawsociety.com.

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Booking form



Please complete the form in BLOCK CAPITALS and send to events@bristollawsociety.com or fax to 0117 945 0860

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Special/dietary requirements:	
* Do you wish to receive future seminar updates?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Member <input type="checkbox"/> or Non-Member <input type="checkbox"/>	
Please invoice <input type="checkbox"/> or I enclose a cheque <input type="checkbox"/> made payable to: Bristol Law Society	

Second Delegate Name:	
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Special/dietary requirements:	
* Do you wish to receive future seminar updates?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Member <input type="checkbox"/> or Non-Member <input type="checkbox"/>	
Please invoice <input type="checkbox"/> or I enclose a cheque <input type="checkbox"/> made payable to: Bristol Law Society	

Once payment has been received you will receive a booking confirmation via e-mail.

* We will not pass your details to any 3rd party.

**Bristol Law Society, St John's Chambers,
Burgess Salmon LLP and sponsors Saffrey Champness
and Towry look forward to welcoming you to our
conference and hope you have an enjoyable and
interesting day.**

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