



Kent Law Society

presents

Lifetime Giving & The Role of The Trustee

7 March 2019 – 1.45pm to 5.00pm



PRESENTER: Professor Lesley King, Professional Development Consultant of the University of Law, is co-author of Wills, Taxation and Administration: A Practical Guide; A Modern Approach to Wills, Administration and Estate Planning (with Precedents); A Practitioner's Guide to Wills; Wills: A Practical Guide and editor of The Probate Practitioner's Handbook. She is the wills and probate columnist for the Law Society Gazette, and writes and lectures extensively on wills, taxation and related matters.

Venue: Holiday Inn – Rochester, Maidstone Road, Chatham, Kent, ME5 9SF
CPD: 3 hours
Fee: £105+VAT (members) £165 + VAT (non-members) (delegates booking two courses on the same day will receive a complimentary sandwich lunch)

This session will cover the following two topic areas:

(1) Lifetime Giving

The trigger for lifetime giving may be altruism or the wish to save IHT or protect assets against care home fees. This session will look at what can and cannot be achieved and problems for professional advisers. It will include:

- when gifts should not be made
- possible reasons for invalidity
 - formalities
 - capacity
 - undue influence
- tax issues
 - IHT exemption
 - reservation of benefit
 - deathbed giving to beat the RNRB taper threshold
 - income tax and CGT issues
 - SDLT pitfalls.

Objectives

After the session those attending will be able to:

- identify situations where lifetime gifts are not appropriate
- advise on the correct way to transfer title
- advise on circumstances in which the deliberate deprivation rules may be relevant
- advise on the tax implications of lifetime gifts

(2) The Role of The trustee

Acting as a trustee is a difficult job, as is providing appropriate professional advice to trustees. This session will look at aspects of the role of the trustee. It will consider:

- identifying trustees' powers
- investment obligations
- when the court can help
- implications of the GDPR
- matters to consider when distributing trust funds
- the importance of record-keeping

Objectives

After the session those attending will be able to:

- advise trustees on the extent of their powers and obligations
- deal with shortcomings of a trust
- identify matters to be taken into account when exercising a power of appointment

BOOKING FORM

We requireplace(s) on:

Lifetime Giving & The Role of The Trustee – Thursday 7 March 2019,
1.45pm to 5.00pm

Name(s) of member(s)

Name(s) of non-member(s)

Firm.....

Address/DX.....

.....

Tel:

Email

(see Privacy Policy below for details of how we use your data)

Email for Invoice (if different to above).....

I enclose a cheque for £..... made payable to **KENT LAW SOCIETY SERVICES LIMITED.**

If you wish to pay by BACS, bank details will be provided on receipt of your booking form. Please send this booking form and your cheque (if applicable) to: Naomi Burbidge, Kent Law Society Services Limited, 13 Langley Gardens, Petts Wood, Orpington, Kent, BR5 1AB **OR** Kent Law Society Services Limited, DX 86851 Locksbottom. Tel: **07970 181228** /Email: **mail@kentlawtraining.co.uk**

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