

# Kent Law Society

## presents

## Private Client Update 2024 16 April 2024

## 9:30-12:30



#### Presenter: Professor Lesley King

Professor Lesley King is a former member of the Probate & Estates Committee of STEP, a former member of the Law Society's Wills & Equity Committee and an honorary member of the Association of Contentious Trust and Probate Specialists. She is Professional Development Consultant at the University of Law and a consultant for Beckbury Advisory Services.

She is co-author of Wills, Taxation and Administration: A Practical Guide; A Modern Approach to Wills, Administration and Estate Planning (with Precedents); A Modern Approach to Lifetime Tax Planning for Private Clients (with Precedents); A Practitioner's Guide to Wills; Varying the Disposition of an Estate after Death; Wills: A Practical Guide; and editor of The Probate Practitioner's Handbook.

She is a contributor to the Wills and Trusts volumes of Halsbury's Laws and the Encyclopaedia of Forms and Precedents and to The Law and Ethics of Dementia.

She is the wills and probate columnist for the Law Society Gazette, and writes and lectures extensively on wills, taxation and related matters.

This session will provide a review of current issues in Private Client Practice. The session will focus on good practice and avoiding pitfalls. The content will depend on developments during the early part of 2024 but is likely to include:

- Implications of the reduced CGT annual exemption: can trustees take steps to minimise CGT?
- The changes to the income tax rules for low income trusts and estate: good or bad news?
- A look at errors in will drafting in recent cases including Pead v Prostate Cancer UK
- Any developments in relation to the Trust Register: the position on post-death variations

#### Objectives

After completing the session delegates will be:

- Aware of recent developments in the private client area
- Able to amend office practices appropriately

 Venue:
 Zoom

 CPD:
 3 hours

 Fee:
 £105+VAT (members) £165 + VAT (non-members)

 Please note that the Zoom link will be emailed to you once you have submitted your booking