

SESSIONS

FUNDAMENTALS DAY - PRIVATE CLIENT SUMMER SCHOOL 2019 - 28/08/
2019

Private Client Summer
School

28 - 30 August 2019
Downing College
Cambridge, UK

Breakfast in Dining Hall

08:00 - 09:00

Registration & Coffee

09:00 - 09:15

Chair's Opening Remarks

09:15 - 09:25

Participants

Richard Manyon - Partner, Payne Hicks Beach

Understanding Tax

09:25 - 10:25

Participants

David Kilshaw - Senior Advisor, Rawlinson & Hunter

Understanding Inheritance Tax

10:25 - 10:55

Participants

Joshua Boughton - Associate, Bryan Cave Leighton
Paisner

Morning Refreshment Break

10:55 - 11:15

Understanding Trusts

11:15 - 11:55

Participants

Thomas Fletcher - Barrister, Maitland Chambers

Contentious Trusts: The Basics

11:55 - 12:55

Participants

James Lister - Partner, Stevens & Bolton

Lunch

12:55 - 13:55

Understanding Pensions

13:55 - 14:35

Participants

Paula Steele - Managing Partner, John Lamb

Basics of Asset Tracing

14:35 - 15:25

Participants

James Sheedy - Senior Associate, Baker & Partners

Afternoon Refreshment Break

15:25 - 15:45

Understanding Investments for Private Clients

15:45 - 16:35

Participants

Joe Donohoe - Director, Asset Risk Consultants

Chair's Closing Remarks and End of Day One

16:35 - 17:05

Participants

Richard Manyon - Partner, Payne Hicks Beach

Punting on the River Cam

17:05 - 18:30

BBQ

18:30 - 19:30

Pimm's Drinks Reception

19:30 - 20:30

SCHEDULE

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09:00	09:00 - Registration & Coffee 09:15 - Chair's Opening Remarks 09:25 - Understanding Tax
10:00	10:25 - Understanding Inheritance Tax 10:55 - Morning Refreshment Break
11:00	11:15 - Understanding Trusts 11:55 - Contentious Trusts: The Basics
12:00	12:55 - Lunch
13:00	13:55 - Understanding Pensions
14:00	14:35 - Basics of Asset Tracing
15:00	15:25 - Afternoon Refreshment Break 15:45 - Understanding Investments for Private Clients
16:00	16:35 - Chair's Closing Remarks and End of Day One
17:00	17:05 - Punting on the River Cam
18:00	18:30 - BBQ
19:00	19:30 - Pimm's Drinks Reception

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DAY 2 - PRIVATE CLIENT SUMMER SCHOOL 2018 - 29/08/2019

Private Client Summer School

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Breakfast in Dining Hall

08:00 - 09:00

Chair's Opening Remarks

09:00 - 09:10

Participants

Nicholas Holland - Partner, McDermott Will & Emery

Introduction to the Court of Protection

09:10 - 09:50

Participants

Mark Lindley - Partner, Boodle Hatfield

HMRC's offshore strategy, the Loan Charge, could it happen to you

09:50 - 10:50

Participants

Ray McCann - Partner, Joseph Hage Aaronson

Morning Refreshment Break

10:50 - 11:10

Trusts & Family Issues

11:10 - 12:00

Participants

Paul Hodgson - Managing Director, Butterfield Trust (Guernsey) Limited

Trusts and Civil Law Jurisdictions: How Do They Work?

12:00 - 12:50

Participants

Ben Havard - Partner, Collas Crill

Benoît Mauron - Counsel, LALIVE

Lunch

12:50 - 13:50

Residence and the Statutory Residence Test

13:50 - 14:40

Participants

Ceri Vokes - Partner, Withers

Trusts and Taxation: Onshore Trust vs Offshore Trusts - How Are They Taxed?

14:40 - 15:30

Participants

Lucy Eldridge - Director, Blick Rothenberg

Afternoon Refreshment Break

15:30 - 15:50

Offshore Trusts & UK Tax Planning: The Basics

15:50 - 16:40

Participants

Patrick Harney - Head of Private Client, Forsters

Understanding Wills

16:40 - 17:20

Participants

Simon Goldring - Senior Associate, Maurice Turnor Gardner

Thomas Dumont QC - Barrister, Radcliffe Chambers

Chair's Closing Remarks and End of Day Two

17:20 - 18:00

Participants

Nicholas Holland - Partner, McDermott Will & Emery

Drinks & Black Tie Gala Dinner

18:00 - 19:00

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10:00	10:50 - Morning Refreshment Break
11:00	11:10 - Trusts & Family Issues
12:00	12:00 - Trusts and Civil Law Jurisdictions: How Do They Work? 12:50 - Lunch
13:00	13:50 - Residence and the Statutory Residence Test
14:00	14:40 - Trusts and Taxation: Onshore Trust vs Offshore Trusts - How Are They Taxed?
15:00	15:30 - Afternoon Refreshment Break 15:50 - Offshore Trusts & UK Tax Planning: The Basics
16:00	16:40 - Understanding Wills
17:00	17:20 - Chair's Closing Remarks and End of Day Two
18:00	18:00 - Drinks & Black Tie Gala Dinner

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DAY 3 - PRIVATE CLIENT SUMMER SCHOOL 2018 - 30/08/2019

Private Client Summer School

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Breakfast in Dining Hall

08:00 - 09:00

Chair's Opening Remarks

09:00 - 09:10

Participants

Jessica Henson - Senior Associate, Bryan Cave
Leighton Paisner

Distributions to UK Beneficiaries

09:10 - 10:10

Participants

Fiona Poole - Partner, Maurice Turnor Gardner

Introduction to Private Equity

10:10 - 11:10

Participants

Alex Foster - Partner, RSM

Morning Refreshment Break

11:10 - 11:30

Foundations

11:30 - 12:20

Participants

Naomi Rive - Group Director, Highvern

Creating Effective Structures for Philanthropy and How to go about Using Them Best?

12:20 - 13:00

Participants

Natasha Kapp - Partner, Carey Olsen

Lunch

13:00 - 14:00

Towards a Toolkit for Safeguarding Against Divorce

14:00 - 14:50

Participants

Alex Carruthers - Partner, Hughes Fowler Carruthers

Capacity Issues

14:50 - 15:30

Participants

Rupert Ticehurst - Partner, Maurice Turnor Gardner

The Remittance Basis

15:30 - 16:00

Participants

Flora Hussey - Senior Associate, New Quadrant
Partners

Chair's Closing Remarks and End of Summer School

16:00 - 16:10

Participants

Jessica Henson - Senior Associate, Bryan Cave
Leighton Paisner

Afternoon Refreshment Break

16:10 - 16:30

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14:00	14:00 - Towards a Toolkit for Safeguarding Against Divorce 14:50 - Capacity Issues
15:00	15:30 - The Remittance Basis
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