

SESSIONS

FUNDAMENTALS DAY - PRIVATE CLIENT SUMER SCHOOL 2018 - 29/08/2018

Private Client Summer School

29th - 31st August 2018

Downing College
Cambridge, UK

Registration & Coffee

08:30 - 09:00

Chair's Opening Remarks

09:00 - 09:10

Understanding Tax

09:10 - 10:10

Participants

David Kilshaw - Partner, Ernst Young

Understanding Inheritance Tax

10:10 - 10:40

Participants

Frederick Bjorn - Partner, Payne Hicks Beach

Morning Refreshment Break

10:40 - 11:00

Understanding Trusts

11:00 - 11:40

Participants

Thomas Fletcher - Barrister, Maitland Chambers

Understanding Investments for Private Clients

11:40 - 12:40

Participants

Joe Donohoe - Director, Asset Risk Consultants

Lunch

12:40 - 13:40

Contentious Trusts: The Basics

13:40 - 14:40

Participants

James Lister - Senior Associate, Stevens & Bolton

Basics of Asset Tracing

14:40 - 15:30

Participants

James Sheedy - Senior Associate, Baker & Partners

Afternoon Refreshment Break

15:30 - 15:50

Understanding Wills & Probate

15:50 - 16:30

Understanding Pensions

16:30 - 17:10

Participants

Paula Steele - Managing Partner, John Lamb

Chair's Closing Remarks and End of Day One

17:10 - 17:20

Punting on the River Cam

17:20 - 18:45

BBQ

18:45 - 19:45

Pimm's Drinks Reception

19:45 - 20:45

SCHEDULE

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Downing College
Cambridge, UK

TIME	
08:00	08:30 - Registration & Coffee
09:00	09:00 - Chair's Opening Remarks 09:10 - Understanding Tax
10:00	10:10 - Understanding Inheritance Tax 10:40 - Morning Refreshment Break
11:00	11:00 - Understanding Trusts 11:40 - Understanding Investments for Private Clients
12:00	12:40 - Lunch
13:00	13:40 - Contentious Trusts: The Basics
14:00	14:40 - Basics of Asset Tracing
15:00	15:30 - Afternoon Refreshment Break 15:50 - Understanding Wills & Probate
16:00	16:30 - Understanding Pensions
17:00	17:10 - Chair's Closing Remarks and End of Day One 17:20 - Punting on the River Cam
18:00	18:45 - BBQ
19:00	19:45 - Pimm's Drinks Reception

SESSIONS

DAY 2 - PRIVATE CLIENT SUMMER SCHOOL 2018 - 30/08/2018

Private Client Summer School

29th - 31st August 2018

Downing College
Cambridge, UK

Breakfast in Dining Hall

08:00 - 09:00

Chair's Opening Remarks

09:00 - 09:10

Participants

Nicholas Holland - Partner, McDermott Will & Emery

UK Trusts Issues from the Bar

09:10 - 10:00

Participants

Richard Dew - Barrister, Ten Old Square

BPR: The Current Picture from Courts & HMRC

10:00 - 11:00

Participants

Ian Maston - Director, Mastoni Tax

Morning Refreshment Break

11:00 - 11:20

Trusts & Family Issues Panel

11:20 - 12:20

Participants

Emma Hargreaves - Barrister, Serle Court

Capacity Issues

12:20 - 13:20

Participants

Rupert Ticehurst - Partner, Bryan Cave Leighton Paisner

Lunch

13:20 - 14:20

Life Time Planning for the Family Home

14:20 - 15:10

Participants

Matthew Braithwaite - Partner, Bircham Dyson Bell LLP

Afternoon Refreshment Break

15:10 - 15:30

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

15:30 - 16:30

Residence and the Statutory Residence Test

16:30 - 17:30

Participants

Ceri Vokes - Partner, Withers

Chair's Closing Remarks and End of Day Two

17:30 - 17:40

Drinks & Black Tie Gala Dinner

17:40 - 18:40

SCHEDULE

DAY 2 - PRIVATE CLIENT SUMMER SCHOOL 2018 - 30/08/2018

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Downing College
Cambridge, UK

TIME	
08:00	08:00 - Breakfast in Dining Hall
09:00	09:00 - Chair's Opening Remarks 09:10 - UK Trusts Issues from the Bar
10:00	10:00 - BPR: The Current Picture from Courts & HMRC
11:00	11:00 - Morning Refreshment Break 11:20 - Trusts & Family Issues Panel
12:00	12:20 - Capacity Issues
13:00	13:20 - Lunch
14:00	14:20 - Life Time Planning for the Family Home
15:00	15:10 - Afternoon Refreshment Break 15:30 - Trusts and Taxation: Onshore Trust vs Offshore Trusts - How Are They Taxed?
16:00	16:30 - Residence and the Statutory Residence Test
17:00	17:30 - Chair's Closing Remarks and End of Day Two 17:40 - Drinks & Black Tie Gala Dinner

SESSIONS

DAY 3 - PRIVATE CLIENT SUMMER SCHOOL 2018 - 31/08/2018

Private Client Summer School

29th - 31st August 2018

Downing College
Cambridge, UK

Breakfast in Dining Hall

08:00 - 09:00

Chair's Opening Remarks

09:00 - 09:10

Offshore Trusts & UK Tax Planning: The Basics

09:10 - 10:10

Participants

Nimesh Shah - Partner, Blick Rothenberg

Distributions to UK Beneficiaries

10:10 - 11:10

Participants

Fiona Poole - Partner, Maurice Turnor Gardner

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

The Issues of Divorce

14:00 - 14:50

Participants

Simon Blain - Partner, Penningtons Manches

Trusts and Civil Law Jurisdictions: How Do They Work?

14:50 - 15:30

Participants

Clare Usher-Wilson - Director, Family Office Services, Summit Trust International

Afternoon Refreshment Break

15:30 - 15:50

Introduction to Private Equity

15:50 - 16:20

Participants

Alex Foster - Partner, RSM

Real Estate Holding Structures

16:20 - 17:00

Chair's Closing Remarks and End of Summer School

17:00 - 17:10

SCHEDULE

DAY 3 - PRIVATE CLIENT SUMMER SCHOOL 2018 - 31/08/2018

Private Client Summer School

29th - 31st August 2018

Downing College
Cambridge, UK

TIME	
08:00	08:00 - Breakfast in Dining Hall
09:00	09:00 - Chair's Opening Remarks 09:10 - Offshore Trusts & UK Tax Planning: The Basics
10:00	10:10 - Distributions to UK Beneficiaries
11:00	11:10 - Morning Refreshment Break 11:30 - Foundations
12:00	12:20 - Creating Effective Structures for Philanthropy and How to go about Using Them Best?
13:00	13:00 - Lunch
14:00	14:00 - The Issues of Divorce 14:50 - Trusts and Civil Law Jurisdictions: How Do They Work?
15:00	15:30 - Afternoon Refreshment Break 15:50 - Introduction to Private Equity
16:00	16:20 - Real Estate Holding Structures
17:00	17:00 - Chair's Closing Remarks and End of Summer School