Bournemouth & District Law Society

PRIVATE CLIENT CONFERENCE

TUESDAY 8 OCTOBER 2024 – 09:15 – 17:00
Marsham Court Hotel, 3 Russell Cotes Road, Bournemouth BH1 3AB

COST

£135 Solicitor Member/Associate Member/Trainee Solicitor
£180 Non-Member of BDLS

CPD

6 Hours

BOOKING

Please book online at:
www.bournemouthlaw.com/bournemouth-district-law-society-lectures

Ref: **600**

Solicitor Competence: **B**
(SRA | Statement of solicitor competence | Solicitors Regulation Authority)

HOTEL PARKING

Marsham Court Hotel, 3 Russell Cotes Road, Bournemouth BH1 3AB

Parking: This is at the rear of the hotel (postcode BH1 3AU) No parking charge. On arrival, please inform hotel reception of your car registration number and, when you leave, ask for the exit code to raise the exit barrier. Alternatively, there is parking at Berry Court in St Peter's Road, Central Car Park in Upper Hinton Road or street parking around the hotel.

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PROGRAMME

08:45 – 09:15 — **REGISTRATION AND REFRESHMENTS**

09:15

INTRODUCTION BY CHAIR
MICHAEL NEWBOLD

Michael is a Private Client Solicitor working at Luff Brook Carter in Ferndown. He specialises in Will drafting, Lasting Powers of Attorneys and Estate administration. He is immediate Past President of BDLS and also past Chair of the BDLS Private Client Group.

09:15 – 10:45
1.5 hours

DIGITAL LPAS
Caroline Bielanska

- **Changes made to the process.**
- **Drafting to add value.**
- **The role of the certificate provider in the light of TA v The Public Guardian.**
- **Who can object and how.**

	Speaker Profile:  Caroline Bielanska TEP, Independent Consultant Solicitor provides support and advice for law firms, to troubleshoot in complex cases involving vulnerable clients, where the interplay between their capacity, care and finance arrangements, care funding, safeguarding and disputes may arise. Caroline is author of numerous leading text books on advising the older client and capacity, including Cretney & Lush on Lasting and Enduring Powers of Attorney (Lexis Nexis), The Practitioners Guide to Court of Protection Practice (Bloomsbury), The Elderly Client Handbook (The Law Society) and Elderly Clients- A Precedent Manual (Jordans). She sits on the Law Society's Mental Health & Disability Committee and the Court of Protection's Rules Review Committee. Caroline won the Trusted Advisor of the Year 2017 and the Vulnerable Client Practice Award 2017 in STEP's Private Client Awards. She was a finalist in 2018, 2019, 2020 & 2021 in the Vulnerable Client Practice Award category.
10:45 – 11:00 **15 mins**	**THE LIGHTER SIDE OF BEING A FUNERAL DIRECTOR** **Simon Head, Head & Wheble**  A Funeral Director faces many challenges whilst arranging funerals for bereaved families. Whilst bereavement brings vast swathes of sorrow and sadness, it can also bring joy when reflecting on the past and memories created and shared. There are many attributes a Funeral Director must possess to be successful in supporting their clients and I wanted to touch on my experiences regarding the brighter side of my vocation and life's work
11:00 – 11:15 **15 mins**	**Refreshments**
11:15– 12:45 **1.5 hours**	**THE FAMILY HOME & SOCIAL CARE FUNDING** **Caroline Bielanska** ➢ **When and how long the home is disregarded in the financial means test.** ➢ **how the local authority values a beneficial interest in the home.** ➢ **What if the home is a mobile home?** ➢ **Paying for additional care using the home as collateral.** ➢ **Deferred Payment Agreements.**
12:45 – 13:45 **1 hour**	**Lunch**
13:45 – 14:15 **30 mins**	**ESTATES DUE DILIGENCE: VERIFYING HEIRS AND FOREIGN ASSETS** **Louise Levene, Finders** • **Verifying the heirs to estates – when to call in the probate genealogists**

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	An explanation of the risk factors and circumstances under which verification becomes appropriate. Led by real-life case studies, with names changed. Includes discussion of Statutory Will and Court of Protection examples. • **Verifying assets in estates** With a focus on assets overseas, we will discuss what documents and information to look out for in the early stages; some warning signs and practical steps; and some case studies to help illustrate issues likely to affect the estates of UK holders of foreign assets like shares, bank accounts and investment accounts. **Speaker Profile:**  Louise Levene is International Asset Services Manager at Finders International. She joined the Finders team in January 2015 and brings over twenty years' experience in the field of probate genealogy and probate support services to her role. With specialist expertise in the particular field of recovering international assets, she has completed a very wide variety of asset-related work for hundreds of estates, from selling shares in the USA and Australia, to closing bank and investment accounts around the world, to obtaining Grants offshore, resealing in Commonwealth jurisdictions, and working persistently and patiently through the red tape everywhere. Louise has built up considerable practical know-how based on her experiences, and she enjoys using this knowledge to navigate the often opaque world of transfer agents and foreign financial institutions, taking a practical, problem-solving approach to help estate administrators cut through the bureaucracy that delays the winding up of worldwide estates.
14:15 – 15:30 **1.25 hours**	**A WILLS UPDATE 2024** **Helen Forster** **Wills are an ever changing area, and template documents always need to be updated in light of new case law and changes to statute. This last year has been no exception, and this session is intended to discuss the modernisation of wills and your processes to ensure that you prepare an advise correctly. You will learn:** ➢ **Electronic assets and the appointment of a digital executor** ➢ **The use of Trusts in Wills** ➢ **Mutual Wills issues** ➢ **Proposed changes; electronic wills and amendments to revocation** **Speaker Profile:**  Helen is the managing director of her law firm, HTF Legal, based in Yorkshire, she is a solicitor and trusts and estates practitioner and has spent over 14 years working in the private client sector. Over the years she has received numerous awards including the category of rising star in England and Wales in the Modern Law Awards in 2016, where she came second. More recently her firm has won "inheritance firm of the year Yorkshire" in 2023. Her

	particular specialisms include tax planning and mental capacity work and, in addition, she provides training and seminars around the country on the subject
15:30– 15:45 **15 mins**	**Refreshments**
15:45 – 17:00 **1.25 hour**	**THE TRS IN 2024 AND THE OUTLOOK** **Helen Forster** **The new rules are now in force requiring the Registration of 'express' trusts with HMRC, regardless of their tax liability. There are some exemptions, and so the legislation is not easy to follow - and may affect a significant number of trustees who may be unaware of the changes and how to implement the rules.** **Furthermore, changes keep being introduced further complicating this area, including discrepancy reporting and the addition of beneficiaries in letters of wishes onto the TRS system.** **Trustees need to be aware of their responsibilities, and similarly practitioners need to be aware of what to advise trust clients.** **The session is suitable for practitioners advising those with existing trusts and those considering creating trusts** **You will learn:** ➢ **Which trusts are now within the scope of the Trust Register?** ➢ **Which trusts are excepted (and which are not)?** ➢ **The impact of the TRS on estates and will drafting** ➢ **The deadlines for registration** ➢ **Annual management - what happens next?** .
17:00	**Close**

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Course Notes: For environmental reasons, BDLS will no longer be providing printed course notes at lectures. Lecture notes will be emailed to delegates in advance for either printing or accessing via their laptop or alternative device on the day.

Payment for lectures: Please be aware that payment must be received at the office **before** the lecture takes place. Course bookings will only be confirmed upon payment. All payments are to be paid by BACS. No refunds within 7 days of the course.