

Where Are We Now: Private Client Post Budget Taxation Update

As the dust settles in the wake of the Budget, what do the next few years hold for private client advisors

21st October 2015 • Millennium Gloucester Hotel, London



Christopher Groves
WITHERS



Ian Maston
MASTONI TAX



Mark Davies
MARK DAVIES & ASSOCIATES
LTD



Jolyon Maugham QC
DEVEREUX CHAMBERS



Elizabeth Wilson
PUMP COURT TAX
CHAMBERS



Organised by:

IBC Global Conferences
Investing business with knowledge

Register Today

Call: +44 (0)20 7017 7790 Email: kmregistration@informa.com

Online bookings and for the latest programme: www.ibc-events.com/BudgetTaxUpdate

Where Are We Now: Post Bu

8:30 Registration

9:00 **Chairman's Welcome and Introduction**



Ian Maston
Partner

MASTONI TAX

9:10 **The Taxation of Income, Profit and Gains**

- The dividend changes
- Buy to let changes
- CGT discussion



Elizabeth Wilson
Barrister

PUMP COURT TAX CHAMBERS

Elizabeth Wilson practises in all areas of revenue law with particular emphasis on personal and corporate tax. Recent advisory work includes advice and planning on capital gains and income tax for individuals and trusts (onshore and offshore), tax issues for divorce, ATED, inheritance tax agricultural and business property reliefs, pensions and employment income, corporate tax (loan relationships, intangibles etc), and SDLT (including the scope of s75A and other anti-avoidance measures). She also advises on EU aspects of tax transactions, and on the HRA 1998.

10:00 **Inheritance Tax and Trusts**

- The changes
- IHT charges on relevant property trusts & IHT simplifications
- Same day additions
- Conditional exemption
- Successive interests in possession



Ian Maston
Partner

MASTONI TAX

Ian Maston is a non-practising solicitor and the owner of Mastoni Tax Ltd, an independent consultancy specializing in private client taxation. Over the last twenty years, Ian has written, lectured and advised on all aspects of inheritance tax, estate planning and trusts. He is a joint author of Tolley's Tax Planning for Owner-Managed Businesses 2014-15 and the current author of Tolley's UK Taxation of Trusts

10:50 Refreshment Break

11:10 **Taxation of Non-Doms and Non-Residents**

- The new deemed domicile rules for Income Tax and Capital Gains Tax after 15/20 tax years from 5 April 2017
- Inheritance Tax deemed domicile rules to synchronise with Income Tax and Capital Gains Tax
- "Boomerang non-doms": punitive measures for Brit expats returning home
- Non-residents investing in UK property through offshore companies, Non-Resident Capital Gains Tax and the extension of Inheritance Tax to shares in a company holding UK residential property
- Changes to the taxation of carried interest – impact on non-dom private equity managers



Mark Davies
Director

MARK DAVIES & ASSOCIATES LTD

12.00 **Issues for Owner Managed Businesses**

- Corporation tax
- OMB reliefs



Christopher Groves
Partner

WITHERS

Chris works in the Wealth Planning department with a particular focus on advising both UK domiciled and non-UK domiciled high net worth individuals in relation to their personal, business and philanthropic affairs. His practice includes advising individuals and trustees on UK tax issues, investment structuring for private investors and asset managers, UK and international trust and estate planning.

12:50 Lunch

Budget Taxation Update

2.00 Taxation of Pensions

- Tax relief on pension contributions
- In depth discussion of the changes



Adrian Mee
Consultant

MATTIOLI WOODS PLC

Adrian joined Mattioli Woods after graduating from Birmingham University with an honours degree in economics. He moved into consultancy after gaining the Diploma in Financial Planning with specialism in pensions. Adrian regularly lectures in pension legislation as both internal and external seminar events as well as being an editor for various tax journals on pension planning. He advises clients on the construction and maintenance of investment portfolios.

2.50 VAT for Private Client Practitioners

- The VAT place of supply rules and the private individual (“consumer”),
- The VAT treatment of trusts, and
- Death of a taxable person



Etienne Wong
Barrister

15 OLD SQUARE

3.30 Coffee

3.50 HMRC Enforcement

- HMRC Offshore Evasion Strategy and related HMRC Consultations
- The impact of tax transparency, specifically UK FATCA and the Common Reporting Standard
- Accelerated Payment Notices



Martin Callaghan
Senior Manager

BDO

Martin is a Senior Tax Manager in BDO LLP's Tax Dispute Resolutions team. As well as dealing with tax investigations and voluntary disclosures to the UK tax authorities, he advises Financial Institutions and their clients about the impact of tax transparency and specifically the OECD's Common Reporting Standard. His areas of specialism include the Liechtenstein Disclosure Facility/Swiss Tax Agreement and international tax issues, both corporate and personal. Martin has written a number of articles and presented a number of times on a wide range of issues including HMRC's latest procedures for investigating tax fraud.



Lisa Vanderheide
Senior Manager

BDO

Lisa is a Senior Tax Manager in the BDO LLP's Tax Dispute Resolutions team. Lisa trained as an Inspector with HMRC and spent several years as an Investigator including three years in the London Specialist Investigations team. Lisa recently joined BDO LLP from a “Big 4” firm. Lisa specialises in HMRC enquiries into tax avoidance and has experience of dealing with HMRC in relation to both corporate and personal tax enquiries

4.30 Tax Planning and Anti-Avoidance

- GAAR
- All other relevant anti-avoidance rules.



Jolyon Maugham QC
Barrister

DEVEREUX CHAMBERS

Jolyon has a predominantly litigation based practice in the fields of direct and indirect tax. He has particular expertise in avoidance, structured finance, intangible property, tax and judicial review, and employment taxation.

5.10 Chairman's Summation

5.15 Start of Drinks Reception



Where are We Now: Post Budget Taxation Update

21 October 2015 • Millennium Gloucester Hotel, London

FKW53235

VIP CODE

WHEN AND WHERE

FKW53235

Venue:

21 October 2015

The Millennium Gloucester, 4-18 Harrington Gardens, London, GB SW7 4LH

Delegates are responsible for the arrangement and payment of their own travel and accommodation. Informa has negotiated a special room rate at a number of hotels nearby, to take advantage please visit the dates/venue page of the conference website: www.ibc-events.com/BudgetTaxUpdate

PERSONAL DETAILS

1st Delegate Mr/Mrs/Ms

Job title/Dept

Company

Address

Telephone

Fax

Email

Nature of Business

Billing Address (if different from above address)

Yes! I would like to receive information about upcoming events by email. By giving you my email address I am giving Informa companies the permission to contact me by email

2nd Delegate Mr/Mrs/Ms

Job title/Dept

Company

Address

Telephone

Fax

Email

Yes! I would like to receive information about upcoming events by email. By giving you my email address I am giving Informa companies the permission to contact me by email

3rd Delegate Mr/Mrs/Ms

Job title/Dept

Company

Address

Telephone

Fax

Email

Yes! I would like to receive information about upcoming events by email. By giving you my email address I am giving Informa companies the permission to contact me by email

Line Manager Mr/Mrs/Ms

Job title/Dept

Telephone

Fax

Email

Booking Contact Mr/Mrs/Ms

Job title/Dept

Telephone

Fax

Email

Unable to Attend - Event Documentation

Nothing compares to being there - but you need not miss out! To order your online documentation simply tick the box, complete your details above and send the form along with payment.

Where are We Now: Post Budget Taxation Update FKW53235 - £225 (Plus VAT @20%)

Documentation orders can only be processed on receipt of credit card details. To ensure we provide the highest level of security for your credit card details we are unable to accept such payments via email or fax, which ensures that these details are never stored on our network. To make payment by credit card: To make your payment on-line, please enter your credit card details in our secure payments website that you will use when making your documentation purchase via the event website (the event web address is near the top of the booking form). Alternatively call our customer service team on +44 (0) 20 7017 7790 or email your phone number with your documentation order to kmregistration@informa.com and we will call you.

EASY WAYS TO REGISTER



Telephone:
+44 (0) 20 7017 7790
Please remember to quote
FKW53235



Email:
kmregistration@informa.com



Fax:
Complete and send this
registration form to:
+44 (0) 20 7017 7824



Web:
www.ibc-events.com/BudgetTaxUpdate

Payment should be made within 14 days of registration.
All registrations must be paid in advance of the event.

HOW MUCH?

Register by 14th August 2015	Register by 25th September 2015	Register after 25th September 2015
<input type="checkbox"/> £899 + VAT @ 20% (£1078.80) SAVE £200	<input type="checkbox"/> £999 + VAT @ 20% (£1198.80) SAVE £100	<input type="checkbox"/> £1099 + VAT @ 20% (£1318.80)

The VAT rate is subject to change and may differ from the advertised rate. The amount you are charged will be determined when your invoice is raised. Savings include Multiple Booking and Early Booking Discounts. All discounts are subject to approval. Please note the conference fee does not include travel or hotel accommodation costs. 50% Discount for 3rd and subsequent delegates. All discounts can only be claimed at the time of registration and multi-booking discounts cannot be combined with other discounts that may be available (apart from early booking discounts which are available to everyone). We are happy to accept a replacement delegate for the whole event, however delegate passes cannot be split or shared between delegates under any circumstances.

TWO EASY WAYS TO PAY

BY CREDIT CARD To ensure we provide the highest level of security for your credit card details we are unable to accept such payments via email or fax which ensures that these details are never stored on our network. To make payment by credit card on-line, please enter your credit card details in our secure payments website that you will use when making your booking via the event website (the event web address is near the top of the booking form). Alternatively call our customer service team on +44 (0) 20 7017 7790.

By Bank transfer: Full details of bank transfer options will be given with your invoice on registration.

TERMS AND CONDITIONS: Attendance at this conference is subject to IIR and IBC Finance Terms and Conditions at <http://www.iiribcfinance.com/page/termsandconditions>. Your attention is drawn in particular to clauses 6, 8 and 14 of IIR and IBC Finance Delegate Terms and Conditions which have been set out below: **Cancellation Policy:** You may cancel your registration in accordance with this Condition 6. You will receive a refund of your fees paid to IIR and IBC Finance (if any); (i) if you cancel your registration 28 days or more before the Conference, subject to an administration charge equivalent to 10% of the total amount of your fees plus VAT; or (ii) if you cancel your registration less than 28 days, but more than 14 days before the Conference, subject to an administration charge equivalent to 50% of the total amount of your fees plus VAT. IIR and IBC Finance regrets that the full amount of your fee remains payable in the event that your cancellation is 14 days or less before the Conference or if you fail to attend the Conference. All cancellations must be sent by email to kmregistration@informa.com marked for the attention of Customer Services and must be received by IIR and IBC Finance. You acknowledge that the refund of your fees in accordance with Condition 6 is your sole remedy in respect of any cancellation of your registration by you and all other liability is expressly excluded. **Changes to the conference:** IIR and IBC Finance may (at its sole discretion) change the format, speakers, participants, content, venue location and programme or any other aspect of the Conference at any time and for any reason, whether or not due to a Force Majeure Event, in each case without liability. **Data protection:** The personal information which you provide to us will be held by us on a database. You agree that IIR and IBC Finance may share this information with other companies in the Informa group. Occasionally your details may be made available to selected third parties who wish to communicate with you offers related to your business activities. If you do not wish to receive these offers please contact the database manager. For more information about how IIR and IBC Finance use the information you provide please see our privacy policy at: <http://www.iiribcfinance.com/page/privacypolicy> If you do not wish your details to be available to companies in the Informa Group, or selected third parties, please contact the Database Manager, Informa UK Ltd, Maple House, 149 Tottenham Court Road, London, W1T 7AD, UK. Tel: +44 (0)20 7017 7077, fax: +44 (0)20 7017 7828 or email FinancialIntegrity@Informa.com. **Incorrect Mailing:** If you are receiving multiple mailings or you would like us to change any details, or remove your name from our database, please contact the Database Manager at the above address quoting the reference number printed on the mailing label. By completing and submitting this registration form, you confirm that you have read and understood the IIR and IBC Finance Delegate Terms and Conditions and you agree to be bound by them.