

"The selection and breadth of ideas was excellent"

(E.Bromett, Wrigley's Solicitors)

4th Annual

Landed Estates: Tax Planning & Wealth Preservation

Register by
9th December 2011
& SAVE £200!

Expert Speaker Faculty Includes:



Jeremy Moody
CAAV



Matthew Hutton
Chartered
Tax Adviser



Hui Ling McCarthy
GRAY'S INN TAX
CHAMBERS



William Massey
QC
PUMP COURT
TAX CHAMBERS



Jeremy Heal
HOWES
PERCIVAL



James Furber
FARRER & CO



Alexander Muir
STANHOPE
CAPITAL



Clive Beer
SAVILLS



Andrew
Wriglesworth
WRIGLEYS
SOLICITORS

3 Reasons Why You Should Attend

- ✓ 7+ Landed Estate speakers including:
 - William Massey QC
 - Jeremy Moody
 - Matthew Hutton
- ✓ Detailed Analysis of Landed Estates Compliance Strategies
- ✓ The only conference to feature an Estate Manager Q&A

Essential Topics Covered for 2012:

- Landed Estate Management Straight from the Horse's Mouth
- "The Rich Man's Considerable Country Residence - Exercises in Estate Planning"
- Solutions for Heritage Properties
- Practical Succession Planning
- Tenancies & Partnerships for Landed Estates

29th February 2012, Courthouse Doubletree, London

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For the Latest Programme & To Register: www.ibc-events.com/landedestates

Landed Estates: Tax Planning

29th February 2012, Court

Dear Landed Estates Practitioner,

"The content of the conference was excellent and based on practical ideas and current issues"

(R Leonard, Dixon Wilson)

This year we have brought in a number of new ideas to what has been an innovative conference for four years running.

We have brought you new speakers and topics for 2012 including:

- Hui Ling McCarthy (GRAY'S INN TAX CHAMBERS) now chairing the conference, Hui Ling will provide a brief update on the latest essential legal decisions for Landed Estates
- William Massey QC will give an insightful session on **Exercises in Estate Planning**. In this session, he will look into IHT planning for rural estates with large houses with reference to BPR - s.110 and 112 IHTA 1984
- Matthew Hutton will give an in-depth analysis of **topical compliance issues** and will disclose HMRC's new 'single compliance process' and information powers
- New topics on **Tenancies & Partnerships and Estate Organisation Issues (to include surrender and regrant)** that will give you practical guidance on revaluations and asset surpluses and the CAP reform proposals

In addition, a unique panel session features practitioners representing Landed Estates including the *Blenheim* and *Duchy* estates. In this session they will describe their concerns and giving you the opportunity to hear straight from the client. **This is the only conference that offers this viewpoint.** In this session, they will describe their concerns and give you the opportunity to hear the client perspective.

In short, the expert speaking panel and in-depth programme have created a great event that you cannot afford to miss.

I look forward to welcoming you to the event in February.

Kind regards



Jonathan Olver
Senior Conference Producer
IBC GLOBAL CONFERENCES

**PS. Don't Forget to Register by
9th December 2011 & SAVE £200**

- 09:00 Registration and Coffee
- 09:30 Chair's Welcome and Recent Case Update
Hui Ling McCarthy
Barrister
GRAY'S INN TAX CHAMBERS
- 10:00 **A Challenge and a Tangle**
 - Preparing for CAP reform
 - Can you be an "active farmer"?
 - Managing 2011 status
 - Capping
 - Surrender and Regrant of Tenancies
 - Issues for the tenant
 - Connected parties**Jeremy Moody**
CAAV Secretary & Adviser
CENTRAL ASSOCIATION OF AGRICULTURAL VALUERS
- 10:40 Coffee
- 11:00 **Heritage Property Update**
 - Classification of heritage property
 - Maximising heritage property relief
 - Exemptions
 - Interaction with old estate duty exemptions**Andrew Wriglesworth**
WRIGLEYS SOLICITORS
- 11:40 **Landed Estate Management: Straight from the Horse's Mouth**
 - Blenheim Estate
 - Duchy Estates
 - APR case study – *Golding v HMRC*Moderated by:
Matthew Hutton
Chartered Tax Adviser
- Panel Members:
James Furber
Partner
FARRER & CO
- Clive Beer**
Head of UK and International Mediation
SAVILLS
- Alexander Muir**
STANHOPE CAPITAL

ing & Wealth Preservation

House Doubletree, London

12:40 **Q&A Panel Session**
This panel session will highlight questions raised during the course of morning sessions concerning recent cases, estate organisation issues, heritage property and landed estate management.

12:55 Lunch

14:05 **“The Rich Man’s Considerable Country Residence - Exercises in Estate Planning”**

- IHT planning for rural estates with large houses: APR, BPR or Conditional Exemption?
- BPR and the rural estate business: farming, house-opening, private museum, bed and breakfast, - s.110 and 112 IHTA 1984
- Avoiding s.105(3) IHTA 1984
- Integrating family trusts and other interests in a single estate business
- The Conditional Exemption route - pros and cons

William Massey QC

Barrister

PUMP COURT TAX CHAMBERS

14:45 **Topical Compliance Issues**

- The key compliance events - and the timetable
- HMRC’s new ‘single compliance process’ and information powers
- Enquiries and discovery assessments - Charlton and other recent decisions
- Inheritance tax account form IHT400 and schedule IHT413 (business and partnership interests and assets) and IHT414 (agricultural relief): getting them right
- Ensuring a quiet life - A few suggestions

Matthew Hutton

Chartered Tax Adviser

15:25 Tea

15:45 **Practical Succession Planning**

- Succession planning as against tax planning
 - Active or passive stewardship?
 - Ownership and control through trusts and partnerships
 - Wills and letters of wishes
 - Pre-nuptial agreements

Andrew Lane

Partner

FORSTERS

16:25 **Tenancies & Partnerships for Landed Estates**

- Putting land into the accounts - dangers and benefits
- Revaluations and asset surpluses - Drake v Harvey [2010] EWHC 1446 (Ch) CA
- ‘Non-existent’ family tenancies and invalid assignments.
- Can one partner terminate a tenancy?
- What happens to a partnership tenancy when the firm is dissolved?

Jeremy Heal

Partner & Head of Estates

HOWES PERCIVAL

17:05 **Q&A Panel Session**

This panel session will highlight afternoon sessions and also analyse the future changes for Landed Estates and onshore tax planning.

17:15 Close of Conference

Testimonials from Previous Landed Estates Conferences:

"The conference was very well tailored to private client practice - the notes will be a handy reference on a daily basis!"

J.Younger, Senior Solicitor, TURCAN CONNELL

"The ability of the speakers to comment on and explain so well, legislation which is so fresh, so quickly"

(D. Florence, Ernst & Young)

I really enjoyed... "The interaction between the speakers ~ getting more than one view"

(M. Shone, Dickenson Dees)

Unrivalled Networking Opportunities

Use this conference as a platform from which to network with well-known landed estate advisers in the field!

If you are interested in meeting these individuals or would like to partner with the event (cocktail reception/lunch sponsor) please contact David.Gold@informa.com

Landed Estates: Tax Planning & Wealth Preservation FKW52333

29th February 2012, Courthouse Doubletree, London

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FKW25333PB

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HOW MUCH?

	Register by 9th Dec 2011 & SAVE £200	Register by 27th Jan 2012 & SAVE £100	Register after 27th Jan 2012
Landed Estates Conference	<input type="checkbox"/> £799 + 20% VAT = £958.80	<input type="checkbox"/> £899 + 20% VAT = £1078.80	<input type="checkbox"/> £999 + 20% VAT = £1198.80

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 & Early Booking Discounts. All discounts can only be applied at the time of registration and discounts cannot be combined. All discounts are subject to approval (apart from early booking discounts which are available to everyone). Please note the conference fee does not include travel or hotel accommodation costs. 50% Discount for 3rd and subsequent delegates. 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.

THREE EASY WAYS TO PAY

- Cheque. Enclosed is our cheque for £ in favour of IIR Ltd
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WHEN AND WHERE

FKW52333

Event location: Courthouse Doubletree by Hilton London

29th February 2012

19-21 Great Marlborough Street
Soho (Off Regent Street), London, W1F 7HL
Tel: +44 (0) 20 7297 5555
Web: www.hilton.co.uk/courthouseregentstreet

Delegates are responsible for the arrangement and payment of their own travel and accommodation. IBC has arranged a special room rate at a number of hotels. If you wish to book a room, please call Venue Search on +44 (0)20 8546 6166 stating that you are an IIR delegate

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