

Agenda Bristol Chartered Connection Breakfast

Venue: Tortworth Court Four Pillars Hotel Bristol, Tortworth, Wotton-under-Edge, GL12 8HH
Date: Thursday, 12 March 2015

Please use this CPD recording agenda to record your CPD and take it home with you to upload to your records on the CII CPD Tool. Do not leave this behind.

08:00 - 08:15 Delegate registration

08:15 - 08:20 Welcome and introduction from the chairman
Hazel Richards

08:20 - 08:55 The Catastrophe Toolkit for Business Owners

Learning objectives: be able to:-

- determine what happens if a business owner becomes ill or dies
- consider the use of Powers of Attorney for business owners
- see what a shareholder/Partnership agreement can do to assist
- see how to use Settlements to avoid the need for probate and to provide for funding
- establish how to use wills and will trusts for tax planning including the double dip.

Andrew Facer, Solicitor, Partner and Head of Private Client, Ward Hadaway

CPD Log

Why did you choose this session and how is it relevant to your learning needs?

Reflective statement - What did you learn and how will you apply it?

08:55 - 09:30 How NOT to lose...IHT Business Property Relief and CGT Entrepreneurs Relief

Learning objectives: be able to:-

- identify clients who would benefit from these reliefs by reviewing real life scenarios
- demonstrate the benefits to clients - and help them to spot the issues and the opportunities
- analyse recent case law and find out where to go for further guidance.

Sally Thomas, Senior Tax Manager, Saffery Champness

CPD Log

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Reflective statement - What did you learn and how will you apply it?

09:30 - 09:45 Q&A

CPD Log

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09:45 - 10:00 **Closing remarks and networking**

The Chartered Connections sessions provide 1 hour and 10 minutes CPD.

The content in each session has been carefully selected and can be considered for both structured and unstructured CPD hours, depending how this activity addressed each individual's personal development needs.

Structured CPD is the undertaking of any formal learning activity designed to meet a specific learning outcome (this is what an individual is expected to know, understand or do as a result of his or her learning).

Unstructured CPD is any activity an individual considers has met a learning outcome, but which may not have been specifically designed to meet their development needs.