

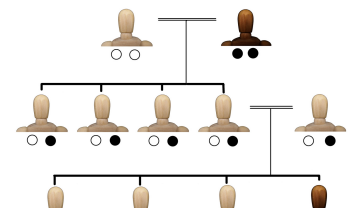


webinar

succession

planning

how to
pass assets
tax-efficiently



part 1: personal succession planning

Friday, 19 November, 09:00 -12:30

3 hours CPD

09:00 Registration

09:30 Administration of estates

- Legal framework
- Rules of intestacy
- Taxation of personal representatives
- Time limits
- Probate rules
- Inheritance tax rates
- Case study

11:00 Personal succession planning

- Territoriality and residence rules – what's caught?
- Valuation date, date of inheritance – tips and traps
- Estates in dispute – beneficial entitlement
- Dwelling house exemption – tips and traps
- Insurance policies
- Exemption for spouses/civil partners/cohabitants
- Family financial assistance – tips and traps
- Heritage property
- Case study

12:00 Trusts

- Trust law framework
- Trusts for incapacitated persons
- Discretionary trust – letter of wishes, protector
- Will discretionary trust
- Trust – tips and traps
- Offshore trusts – anti-avoidance
- Case study

12:30 Q & A to panel



"Succinct, topical, and relevant"

"Innovative thought-provoking ideas"

"Excellent seminars - very informative"

part 2: business succession planning

Monday, 22 November, 09:00 -12:30

3 hours CPD

09:00 **Registration**

09:30 **Lifetime transfer of business/farm**

- CGT retirement relief – conditions, tips and traps
- Entrepreneur relief – the 10% CGT rate
- CAT agricultural relief – conditions, tips and traps
- CAT business relief – conditions, tips and traps
- Stamp duty relief – qualifying farmers
- Share buybacks/redemptions – conditions, tips and traps
- Termination payments for directors
- Pension planning
- Family partnerships – tips and traps
- Case study

11:00 **Selling a business**

- Sale of assets – business sale agreement
- CGT retirement relief – tips and traps
- Entrepreneur relief – the 10% CGT rate – how to maximise
- Holding company exemption – conditions, tips and traps
- Foreign holding companies – tips and traps
- General anti-avoidance legislation
- Case study

12:00 **Post-death transfer of business/farm**

- Shareholder/partner protection insurance
- CAT agricultural relief – conditions, tips and traps
- CAT business relief – conditions, tips and traps
- Disclaimer / Deed of family arrangement
- Appropriation of assets
- Case study

12:30 **Q & A to panel**



"Straight to the point"

"Makes tax planning real"

"Enlightening and useful"



James Caron

Lucas Financial Consulting Ltd
- has worked in financial services since 1986.



Alan Moore

CEO, Tax World Ltd
42 years tax experience
- with Revenue and in practice.



Gary O'Mahony

Managing Partner
O'Hara Dolan & Co
35 years tax experience.

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