

GOOD PRACTICE AND AVOIDING LITIGATION IN RELATION TO WILLS AND TRUSTS

WEDNESDAY 30 MARCH 2022 – 14:00 – 17:15

Registration: 13:45
Venue: Carlton Hotel, East Overcliff, Grove Road, Bournemouth, Dorset, BH1 3DN
Please note the entrance to the large car park is in Grove Road. There is no charge for BDLS delegates to park at the hotel – they will just need to give Reception their car registration number on arrival.
Cost: £95.00 – Member and Associate Members of BDLS/Trainee Solicitor
£145.00 – Non-Member of BDLS

3 hours CPD

Even if not facing a negligence claim, it is stressful and expensive to be involved in litigation over contested wills. This session looks at internal office processes and procedures that can help avoid errors. It will also look at some common problems in relation to planning and drafting wills and administering estates and trusts. It will consider:

Processes and Procedures:

- **Arranging the initial interview**
- **Use of questionnaires**
- **Attendance notes**
- **Confirming instructions**
- **Avoiding misunderstandings**
- **Medical reports**
- **Checking the will**
- **Execution of the will**
- **Larke v Nugus precautions**
- **Review of precedents**

Planning and drafting:

- **Flexible life interest trusts**
- **Property possibly qualifying for relief**
- **Potential I(PFD)A claims**

Administration of estates:

- **Loss on sale relief**
- **Post-death variations**

Managing trusts:

- **Self dealing**
- **Fraud on a power**
- **Public Trustee v Cooper applications**
- **Appointment and removal of trustees**

This lecture will be presented by **LESLEY KING**. Professional Development Consultant at the University of Law is Co-Author of Wills, Taxation and Administration: A Practical Guide; A Modern Approach to Wills, Administration and Estate Planning (with Precedents); A Practitioner's Guide to Wills; Wills: A Practical Guide and Editor of The Probate Practitioner's Handbook. She is the Wills and Probate Columnist for the Law Society Gazette, and writes and lectures extensively on Wills, Taxation and related matters.



BOOKING FORM
GOOD PRACTICE AND AVOIDING LITIGATION IN RELATION TO WILLS AND TRUSTS
WEDNESDAY 30 MARCH 2022
14:00 – 17:15 – CARLTON HOTEL, BOURNEMOUTH

Please complete and return this slip with your payment by Wednesday 23 March 2022

Bournemouth and District Law Society, Borough Chambers, Fir Vale Road, Bournemouth BH1 2JJ – DX 7616
Bournemouth – Tel: 01202 587551 email: office@bournemouthlaw.com

No*	Membership Type	Cost
	Solicitor Member	£95
	Associate Member	£95
	Trainee Solicitor	£95
	Non-Member	£145
Cheque/BACS* payment made for		£

*Please indicate

BACS: Account Name: Bournemouth & District Law Society
Account No: 56568851 Sort Code: 56-00-35.
Important: Please quote reference **"902/initials or surname of delegate"**

Name of Delegate(s)	
Name of Firm	
Address/DX No	
Email	