

TRUSTS FROM START TO FINISH

THURSDAY 7 MARCH 2024 – 14:00 – 17:15

- Registration:** 13.30
- Venue:** Marsham Court Hotel, 3 Russell Cotes Road, Bournemouth BH1 3AB
- Parking:** This is at the rear of the hotel (postcode BH1 3AU) and there is no parking charge. On arrival, please inform hotel reception of your car registration number and, when you leave, ask for the exit code to raise the exit barrier. Alternatively, there is parking at Berry Court in St Peter's Road, Central Car Park in Upper Hinton Road or street parking around the hotel.
- Cost:** **£75** Solicitor Member; Associate Member; Trainees (Solicitor, Cilex & Apprentices)
£100 Non Member of BDLS
- Booking Reference:** 987
- CPD:** 3
- SRA Competence:** B <https://www.sra.org.uk/solicitors/resources/continuing-competence/cpd/competence-statement/>

Trusts can be a valuable tool for planning purposes in private client work. However, whilst many practitioners have prepared trusts either inter vivos or on death, management of these moving forward can be problematic and clients should always be advised fully of the tax liabilities and advantages of each trust before proceeding with setting these up. You also need to be aware of how to set up a trust and the pitfalls of negligent drafting.

In addition, trustees must be informed of their duties and obligations, including the new registration of trusts regime that has come into force. A failure to advise clients properly can result in issues in the long term...

This session will run through the different types of trust, how they work, how to draft them and the potential pitfalls.

Speaker Profile:

This lecture will be presented by **Helen Forster**. Helen is the managing director of her law firm, HTF Legal, based in Yorkshire, she is a solicitor and trusts and estates practitioner and has spent over 14 years working in the private client sector. Over the years she has received numerous awards including the category of rising star in England and Wales in the Modern Law Awards in 2016, where she came second. More recently her firm has won "inheritance firm of the year Yorkshire" in 2023. Her particular specialisms include tax planning and mental capacity work and, in addition, she provides training and seminars around the country on the subject



Please book online at:

<https://www.bournemouthlaw.com/bournemouth-district-law-society-lectures>

Course Notes: For environmental reasons, BDLS will no longer be providing printed course notes at lectures. Lecture notes will be emailed to delegates in advance for either printing or accessing via their laptop or alternative device on the day.

Payment for lectures: Please be aware that payment must be received at the office **before** the lecture takes place. Course bookings will only be confirmed upon payment. All payments are to be paid by BACS. No refunds within 7 days of the course.