


**PRIVATE CLIENT CONFERENCE**  
**WEDNESDAY 8 OCTOBER 2025 – 09:00 – 17:00**  
**Marsham Court Hotel, 3 Russell Cotes Road, Bournemouth BH1 3AB**

COST	
£135	Solicitor Member/Associate Member/Trainee Solicitor
£180	Non-Member of BDLS
CPD	
6 Hours	
BOOKING	
Please book online at: <a href="http://www.bournemouthlaw.com/bournemouth-district-law-society-lectures">www.bournemouthlaw.com/bournemouth-district-law-society-lectures</a>	
Ref: <b>654</b>	
Solicitor Competence: <b>B</b> <a href="#">(SRA   Statement of solicitor competence   Solicitors Regulation Authority)</a>	
HOTEL PARKING	
<b>Marsham Court Hotel, 3 Russell Cotes Road, Bournemouth BH1 3AB</b>	
<b>Parking:</b> This is at the rear of the hotel (postcode BH1 3AU) 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.	

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08:30 – 09:00	Registration and Refreshments	
09:00	<b>INTRODUCTION BY CHAIR</b> <b>MICHAEL NEWBOLD</b>	
09:00 – 10:15 1 hour 15 mins	<b>A WILL DRAFT UPDATE</b> <b>HELEN FORSTER</b> <p>This presentation will cover:</p> <ul style="list-style-type: none"> <li>• The New Will Bill</li> <li>• Digital Assets and Digital Executors</li> <li>• Mutual Wills</li> <li>• Protecting from IHTA claims</li> </ul> <p><b>Speaker Profile:</b></p> <p>Helen is the Managing Director of her law firm, HTF Legal, based in Yorkshire. She is</p>	

	<p>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 Managing Partner of the Year 2025 in the Modern Law Private Client awards, as well as highly commended as Female Trailblazer of the Year 2025 in the Modern Law Awards. Her firm was awarded Boutique Law Firm of the Year 2025 in the same awards. Her particular specialisms include tax planning and mental capacity work and, in addition, she provides training and seminars around the country on the subject.</p> 
<b>10:15 – 10:45</b> <b>30 mins</b>	<b>TOPIC TO BE CONFIRMED</b> <b>ALAN TAYLOR, FINDERS</b>
<b>10:45 – 11:00</b> <b>15 mins</b>	<b>Refreshments</b>
<b>11:00 – 11:15</b> <b>15 minutes</b>	<b>AN INSIGHT INTO THE CURRENT AFFAIRS OF THE FUNERAL INDUSTRY</b> <b>ROBERT HEAD, HEAD &amp; WHEBLE</b> <ul style="list-style-type: none"> <li>• Welcome &amp; Introduction</li> <li>• Regulation</li> <li>• The Rise of Direct Cremation</li> <li>• UK Funeral Industry Overview</li> <li>• Local News</li> </ul> 
<b>11:15– 12:30</b> <b>1 hour 15 mins</b>	<b>TRUSTS DRAFTING</b> <b>HELEN FORSTER</b> <ul style="list-style-type: none"> <li>• Inter vivos vs will trusts</li> <li>• Clauses</li> <li>• Common problems</li> <li>• Tax</li> </ul>
<b>12:30 – 13:20</b> <b>50 mins</b>	<b>Lunch</b>
<b>13:20 – 13:30</b> <b>10 mins</b>	<b>JULIA'S HOUSE: THE COMMUNITY'S LEGACY</b> <b>DR MARTIN EDWARDS CHIEF EXECUTIVE, JULIA'S HOUSE</b>
<b>13:30 – 14:15</b> <b>45 minutes</b>	<b>DEPUTIES &amp; ATTORNEYS FOR PROPERTY AND AFFAIRS – A 2025 UPDATE.</b> <b>CAROL DAVIES, COLLEGE CHAMBERS</b> <p>Carol will review the most relevant cases and updated guidance relating to deputies and attorneys for property and affairs in 2025, to include:</p> <ul style="list-style-type: none"> <li>• Removal of deputies</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Family care payments</b></li> <li>• <b>Gifts</b></li> <li>• <b>Costs and remuneration for deputies</b></li> </ul> <p><b>Speaker Profile:</b></p> <p>Carol is a barrister, mediator and arbitrator at College Chambers, Southampton. She has practiced for 28 years in civil litigation and family financial matters with particular interest and specialism in probate and inheritance cases. Carol has also dealt with Court of Protection matters, in terms of both property and affairs and health and welfare since 2007 acting for the Official Solicitor, local authorities and families. Her practice now focusses on probate, inheritance and COP property and affairs matters. Carol is also a civil and commercial mediator and a Fellow of the Chartered Institute of Arbitrators.</p> 
<b>14:15 – 15:30</b> <b>1 hour 15 mins</b>	<p><b>IHT PLANNING POST BUDGET</b></p> <p><b>LESLEY KING</b></p> <p><b>The £1m cap on business and agricultural relief announced in the October 2024 Budget was extremely unwelcome. At the time of writing some details are unclear. A technical document was published by HMRC in early 2025 providing some details of how the reliefs will apply to transfers into trusts.</b></p> <p><b>For elderly taxpayers who had used AIM shares as part of their IHT planning, the reduction in the rate of relief to 50% was a blow, compounded by the inclusion of undrawn pension pots in the IHT estate</b></p> <p><b>This session will look at the implications of the changes and what if anything taxpayers can do.</b></p> <p><b>Speaker Profile:</b></p> <p>Lesley King is a Professional Development Consultant at the University of Law; 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.</p> 
<b>15:30– 15:45</b> <b>15 mins</b>	<p><b>Refreshments</b></p>
<b>15:45 – 17:00</b> <b>1 hour 15 mins</b>	<p><b>VARYING THE DISPOSITION OF ESTATES</b></p> <p><b>LESLEY KING</b></p> <p><b>Post-death variations are often seen as 'bread and butter' for private client practitioners but there are a number of pitfalls. This session will look at</b></p>

	<p><b>how to avoid the pitfalls but will also look at the opportunities for adding value for clients. It will look at:</b></p> <ul style="list-style-type: none"> <li>• <b>The statutory provisions available and the differences between them</b></li> <li>• <b>The formalities required</b></li> <li>• <b>The limitations of the various statutory provisions</b></li> <li>• <b>Ways in which the provisions can be used to benefit clients</b></li> <li>• <b>The difference between the IHT and CGT consequences of a variation</b></li> <li>• <b>Implementing a settlement under I(PFD)A 1975</b></li> </ul>
17:00	Close

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**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.

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