



Invitation

Trusts and tax planning for your future – are they on your radar?

Tuesday 28 February 2012

Chantrey Vellacott DFK

Russell Square House

10 - 12 Russell Square

London WC1B 5LF

Registration from 6.00pm

This seminar is free of charge.

Seminar Invitation

Trusts and tax planning for your future – are they on your radar?

It is never too early to start considering tax planning for your future. Do you know what opportunities exist? Are you fully exploiting all that are available to you? Are you getting the right guidance from your tax advisor?

In this short evening seminar our Private Client team will review the different areas that individuals should consider in an effort to reduce their tax bill. The team will offer solutions to key personal tax issues and outline the penalties for non-compliance.

What will I learn at this seminar?

- effective tax planning tools available to you;
- how you can reduce your inheritance tax bill;
- why trusts are still a viable tax planning tool;
- solutions to mitigate the 50% tax rate for both individuals, and those with business interests.

This seminar is free of charge and is relevant to all individuals with personal tax arrangements.

Date: Tuesday 28 February 2012

Time: 6.00pm registration
6.30pm - 7.30pm seminar
7.30pm networking, wine and canapé reception

Location: Chantrey Vellacott DFK
Russell Square House
10 - 12 Russell Square
London
WC1B 5LF

RSVP to events@cvidfk.com, or complete and return the detachable reply form.

For more information contact Katie Fitzsimons 0207 509 9344.

Subjects and Speakers



Trusts – still a viable tax planning tool?

Raj Kataria, Trust Manager

Are the compliance costs associated with running a trust becoming an issue for you? The focus of trust creation shifted following the Finance Act 2006 – we ask if trusts are still important and if they remain a viable option for planning for the future and minimising your inheritance tax bill?



Inheritance Tax – outline and exemptions

Tejinder Kalsi, Trust Senior

What can you do to reduce your exposure to inheritance tax (IHT) and what are the pitfalls you should look out for? Simple planning can help minimise the amount of IHT to be paid and in this section we outline the exemptions that are available to you and explain the benefits of these.



50% tax rate – tax planning opportunities to mitigate the effects

Debbie Ince, Head of Private Client

Nine months ago the 50% tax rate was introduced. This new rate has affected the 300,000 highest earners in the UK, those earning £150k+. What has been learnt in that period that will potentially mitigate the effects for both individuals, and those with business interests? What should your personal tax advisor be doing for you to ensure that your exposure to this higher level of income tax is minimised?



The tax penalty regime

Trevor Paterson, Tax Manager

The new tax penalty regime, implemented for the first time this year, ensures that returns are filed on time. What are the penalties and how draconian can they be? What are the simple steps to ensure we don't pay the taxman more than we need to?



Domicile, residence and offshore trusts – the basics

Peter Jones, Tax Manager

In the 2011 budget, the government announced its intention to introduce a statutory definition of UK tax residence for individuals. The statutory residence test (SRT) will take into account both the amount of time the individual spends in the UK and the other connections they may have with the UK. What are your domicile and residence, and what will this proposed change mean for you, your business interests, and your tax bill? What potential issues exist where an individual may not be domiciled in the UK, or has assets in other jurisdictions?

Registration Form

To reserve a place at this seminar please email events@cvedfk.com, or complete and return this detachable reply form:

Trusts and tax planning for your future – are they on your radar?

London - Tuesday 28 February 2012

Applicant 1

Name

Email

Address

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Postcode

Phone

Organisation

Job Title

Applicant 2

Name

Email

Address

.....

.....

Postcode

Phone

Organisation

Job Title

Please return this form to: Events Team
Chantrey Vellacott DFK, Russell Square House,
10-12 Russell Square, London WC1B 5LF

Tel: 020 7509 9344

Email: events@cvedfk.com

About Chantrey Vellacott DFK

Chantrey Vellacott DFK is a long established firm of chartered accountants. The firm has over 50 partners in 10 offices and some 350 staff. The Private Client team works with clients to fulfil their compliance needs, to offer proactive advice and to assist in planning for tax and business issues and concerns both today and in the future.

The wider Private Client team is based throughout our offices across the country. We provide our clients with an excellent service with special emphasis on personal contact and value for money.

For the individual, we offer:

- Planning for retirement and business succession
- Advice on the protection of assets and passing wealth down the generations
- Review of wills and trust deeds for tax efficiency and effectiveness
- Advice on the taxation of beneficiaries and completion of inheritance tax returns
- Assisting clients to meet their objectives for themselves, their families and future generations
- Mitigation and postponement of tax liabilities
- A full compliance service

We can also assist with one-off transactions such as:

- Share options and other employee benefits
- Investing – or disinvesting – in business ventures
- Buying and selling second homes and properties abroad
- Tax-efficient investment opportunities
- Residence and domicile
- Structuring your affairs in the event of separation and divorce
- The taxation of Lloyds names
- Charitable giving

For a full list of services offered by the Private Client team, please visit our website **www.cvdfk.com/privateclient**

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