DEATH & TAXES COURSE
PART FOUR

LAW SKILLS

Consultancy & Training

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An Introduction to Trusts
2 day course – introductory

Aim

This course is aimed at people in law firms new to Trusts who are changing discipline and those who would welcome a basic refresher if they have not administered trusts for some years. It is designed to look at good practice and procedure as well as incorporating relevant issues of law and tax. There will be case studies to aid understanding.

Outcomes

Participants will:

- Be able to understand the differences between types of trust; when to use them and basic drafting issues
- Know how to set up and manage a trust from start to finish
- Have a series of checklists and questionnaires for use in the office
- Understand the impact of taxation on the different types of trust, in particular the Finance Act 2006 changes
- Know of the available precedents & software for use in the office

Agenda

1. Background
2. Administration - Getting Started
3. Taxation of Trusts
4. Administration implications of Trustee Act 2000
5. Trustees' decision making
6. Financial Services
7. Dealing with various events

This two day course attracts 12 CPD hours
SRA CPD Provider reference no: BMP/LASK
ILEX: Quote Course code on ILEX log