

## session 1 - pensions: the new regime & planning

## session 2 - effective IHT planning

### Monday 13th June 2011

In the last 12 months we have seen the most significant changes to pension legislation since A-Day. These changes affect people still working and also those in retirement. In this seminar you will find out if and how these changes affect you and how you could plan your affairs going forward to ensure you take advantage of the opportunities but also avoid some of the pitfalls.

#### the programme

3.30pm registration and coffee  
4.00pm welcome

the new pensions regulations following the Spring Budget and Finance Act 2011

- a look at the recent changes including the death of anti-forestalling, £50k cap on annual contributions, Pension Input Periods (PIP) and Carry forward

#### contributions

- including lifetime allowance and defined benefits

#### planning opportunities

- how to manage pressure points and longer term solutions for all the family

5.30pm question & answer session followed by drinks

#### speakers

*Nigel Landsman, partner*  
**haysmacintyre**  
*Jon Rolfe, consultant*

*Barry Newbury*  
*Duncan Watson*  
**Epoch Wealth Management**

### Tuesday 28 June 2011

For the last few years many have put off planning to reduce their Inheritance Tax bills in the hope that David Cameron would extend the Nil Rate Band to £1m. Having U-turned on this proposal under the Coalition government those with estates of £650,000 + may now wish to reconsider ways to manage their affairs and minimise this tax. This seminar will provide you with a chance to consider the suite of opportunities available to you.

#### the programme

3.30pm registration and coffee  
4.00pm welcome

critical tax issues and areas for consideration including

- lifetime exemptions and gift allowances  
- potentially exempt and lifetime transfers  
- wills – making wills tax efficient

#### alternative planning opportunities

- making gifts whilst retaining control and an element of access  
- insuring the liability  
- taking advantage of EIS & BPR relief

5.30pm question & answer session followed by drinks

#### speakers

*Anne Gregory-Jones, partner*  
**haysmacintyre**  
*Jon Rolfe, consultant*

*Russell Jarvis*  
**Epoch Wealth Management**

**who should attend?**  
These seminars are suitable for all individuals, whether business owners or not.

Each session will call upon specialists to share their expertise and experience

“Question & Answer” sessions will give you an opportunity to challenge the experts

**Book online now at**  
[haysmacintyre.com/events](http://haysmacintyre.com/events)

**For booking queries please contact our events team**

t: 020 7969 5698

e: [events@haysmacintyre.com](mailto:events@haysmacintyre.com)

#### Delegate details

(for additional delegates please copy this form)

Please use block capitals

title \_\_\_\_\_

name \_\_\_\_\_

surname \_\_\_\_\_

position \_\_\_\_\_

e-mail \_\_\_\_\_

organisation \_\_\_\_\_

telephone \_\_\_\_\_

address \_\_\_\_\_

#### I would like to book:

**session 1 – pensions: the new regime and planning**

**Monday 13th June 2011**

3.30pm registration  
4.00pm seminar commences  
5.30pm drinks and networking

**session 2 – effective IHT planning**

**Tuesday 28th June 2011**

3.30pm registration  
4.00pm seminar commences  
5.30pm drinks and networkings

#### details:

Please book online at [www.haysmacintyre.com/events](http://www.haysmacintyre.com/events)

Alternatively, you can send your completed registration form to:

**Rhona Thomson, haysmacintyre, Fairfax House, 15 Fulwood Place, London WC1V 6AY**

Booking confirmation and instructions will be sent to you prior to the event.

**Queries:** contact our events team 020 7969 5698 or [events@haysmacintyre.com](mailto:events@haysmacintyre.com)

Data protection: please tick this box if you do not wish to receive future mailings