



Northern Ireland

ADVISING FAMILIES ACROSS GENERATIONS

PROBATE PRACTITIONERS DAY

DATE:	Wednesday 17 th April 2019
TIME:	10.00 am – 4.45 pm
PLACE:	Stormont Hotel, Belfast
COST:	£165 (£145 for members of STEP)
CPD Allocation:	Solicitors: 5 hours including 2 conveyancing and 1 client care hour. This event should qualify for CPD purposes for other professional bodies.

Seminar Information

The Northern Ireland Branch of the Society of Trust and Estate Practitioners (STEP:NI) is delighted to invite you to this year's event which aims to continue the same successful format of covering important topics of the moment which are of interest to all those involved in probate matters as well as the usual practical updates.

This year's programme includes a wide range of topics of interest to all private client practitioners.

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Programme

- 9.30 – 10.00 **Registration & Coffee**
- 10.00- 10.30 **Twenty things you may not know about Title Insurance**
John Logan, Senior Underwriter, Stewarts Title Limited
- 10.30- 11.30 **Rights of Residence, Trusts on Divorce and General Succession and Trusts Law update**
Sheena Grattan Barrister-at-law, TEP
- Coffee break**
- 11.45 – 12.30 **The Residence Nil Rate Band**
Fiona Hall, CTA, TEP: Tax Principal BDO
- 12.30 – 12.50 **Estate Research**
- Lunch**
- 1.30 – 2.15 pm **The Charity as Entitled Beneficiary**
Sarah Anderson and Chris Rae, Cancer Research UK
- 2.15 – 3.00 **Nursing Care & Asset Protection**
Michael Graham, Director, Cleaver Fulton Rankin
- 3.00 – 3.45 **It is your life but who is planning it?**
Robert Stevenson, SRG Financial Management Ltd
- Tea break**
- 4.00 – 4.45 **Surviving a Deceased's Insolvency: A Practical Guide to the Administration of Deceased Insolvent Estates**
Maria Glover, Partner, Napiers and Sons

Speakers

John Logan - a solicitor with over 25 years' experience in the Scottish property market, both in private practice and the public sector, is a Senior Underwriter and Country Manager for Scotland and Northern Ireland. He qualified as a Solicitor in 1985 and has been involved in title insurance since 2001. He has been a Senior Underwriter with Stewart Title Limited since 2006, where he has been instrumental in developing the title insurance market and has been responsible for formulating policies and appropriate cover for risks.

Sheena Grattan BL, TEP - A practising barrister in Northern Ireland. Her practice is primarily in Wills, Probate, Trusts and associated Taxation, including all aspects of Contentious Estates Disputes. She is the author of *Succession Law in Northern Ireland (SLS)*, *Testamentary Negligence (SLS)*, *Practical Will Drafting (SLS)* and, with James Kessler, *Drafting Trusts & Will Trusts in Northern Ireland* (Bloomsbury) now in its 3rd edition.

Fiona Hall - Tax Principal of the Private Client Tax Team in BDO NI, an accountancy firm based in Belfast. Fiona has experience in all areas of personal taxation, with a specialism in Inheritance Tax planning and the taxation of trusts and estates. Fiona works with wealthy individuals and families with interests in owner managed businesses to provide tax solutions to meet their financial and succession objectives. She is a member of the Chartered Institute of Taxation and STEP, serving as a committee member of the STEP NI branch.

Sarah Anderson - Sarah has worked in Legacies at Cancer Research UK for over 4 years, recently as an Area Legacy Manager, overseeing a UK-wide team of Community Legacy Managers across the UK. She is now the Senior Legacy Partnership Manager for Friends and Family, leading the Legacy Management Officers who specifically handle cases administered by lay executors. She has over twenty years of charitable experience and a decade invested in legacy giving and relationship management.

Chris Rae - Chris has been the Legacy Partnership Manager for Cancer Research UK in Northern Ireland & Scotland since 2018, working with local solicitor firms who offer Cancer Research UK's 'Free Will Service' to their clients. Chris has over 5 years' experience working in professional partnerships in the insurance and charity sectors, and over 10 years within sales and service operations. Chris supports partnerships through Cancer Research UK's business development opportunities, CPD events, and increasing awareness of the impact legacies make on Cancer Research UK's essential progress.

Michael Graham - a solicitor and Head of the Private Client Department at Cleaver Fulton Rankin, specialising in trusts, tax, the administration of estates and issues affecting elderly and vulnerable clients. He is a former Chair of STEP NI and also sits on the Law Society of NI committee for Non-Contentious Business. He is a Full Accredited Member of Solicitors for the Elderly. Michael is a member of the Executive Committee of Will to Give, a local charity created to promote charitable giving by will in Northern Ireland.

Robert Stevenson – a Chartered and Certified Financial Planner and a member of STEP. He runs his own business in Ballymena with an increasing emphasis on Lifestyle Financial Planning, helping clients better prepare for the un-expected transitions that can occur in life. He works with clients to help them understand the life they want and how to maintain that lifestyle.

Maria Glover - a partner and licensed Personal Insolvency Practitioner in Napier & Sons Solicitors, Belfast. She studied law at Queen's University and graduated with a first class honours degree. As a practising solicitor, Maria has acquired over a decade of experience in the field of Insolvency. Representing private clients before the Bankruptcy & Companies Master on a daily basis, Maria is regarded as 'a rising star' and is widely recognised for her technical expertise. She obtained her licence as an Insolvency Practitioner only Solicitor in Northern Ireland to successfully undertake the Joint Insolvency Examination so uniquely qualified within the legal sector.

About our sponsors

Stewart Title is a UK registered Insurance Company which is regulated by the FCA and the PRA. It provides property indemnity insurance in the form of a range of products including full title insurance, defective title insurance, restrictive covenant insurance and various local and other property search covers. Its clients include various Lenders, property developers and both large and small law firms. A large part of its work is involved with large residential property developments where the cover sought runs into millions and where it can accommodate that level of cover due to the availability of reinsurance. Any claims are dealt with promptly in house.

Estate Research: Our expertise lies in tracing next of kin and missing beneficiaries across the globe. For the legal sector we have developed an array of services: some of which are free, all of which are designed to overcome problems encountered by practitioners. With local expertise and international coverage we have successfully traced beneficiaries both in the UK and abroad. Established on trust since 2001 we remain loyal to our founding principles of transparency and accountability. Through our commitment to quality, ethics and accountability we seek to provide a quality service that practitioners will use and, crucially, use again. We deliver comprehensive research and distil our findings in a succinct report that you can rely upon. At Estate Research we are happy to help your firm wrap up any case, no matter size, age or complexity. We understand that every case is unique and so recognize the importance of choice. This is why we strive to provide our private client practitioners with a range of fee options and allow you and your client to decide what suits you. We have a policy of transparency informing beneficiaries of all the salient details as we think this is the right thing to do.

Your Reservation Details

Probate Practitioners Day 2019

Please reserve ____ place(s) on **17th April 2019 at the Stormont Hotel**

Cost: £165 per person

STEP Members Cost: £145 per person

STEP Membership Number _____

NAME(S) _____

ADDRESS _____

TEL _____

FAX _____

DX _____

EMAIL _____

Please indicate any special dietary or access requirements. Payment must be received prior to the event. Cancellations are non-refundable but bookings may be carried forward to a subsequent event. If an event is cancelled by STEP NI a full refund will be made.

STEP NI would like to keep you updated via email on future events which may be of interest to you. If you do **not** wish to receive further information please tick this box

Payment method:

Cheque made payable to: **STEP Northern Ireland**

Direct transfer to **STEP Northern Ireland** account – Sort code 20-03-53 Account number 5371 4829; SWIFTBiC BARCGB22; IBAN GB37 BARC 2003 5353 7148 29

Your reservation details:

Please post or email to:

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Email: jafoy@deloitte.ie