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SEPTEMBER – DECEMBER 2019

Private Client Practice

Your Training Guide

Central Law Training

Your Private Client Training Guide

We are pleased to introduce the September – December 2019 Training Guide. Are you ready to submit your SRA declaration by 31 October 2019? Take this opportunity to reflect upon and address your learning and development needs with our extensive range of training courses and webinars, designed to support you in developing and maintaining your professional competence.

Central Law Training, the UK's leading provider of post-qualification training for legal professionals provides training **courses, conferences, webinars and e-learning.** These are delivered by expert speakers to help you develop your skills and knowledge.

With experience of working closely with firms of all sizes, corporates and public bodies, we are the perfect legal training partner to help you maximise your training budget and ensure you and your firm receive the training that you need.

View our full range of training at www.clt.co.uk to ensure you have addressed your learning and development needs by 31 October.

A Key to *Your* Training Guide

To help you identify the right training for you, each course is tagged with the SRA competency area(s) that it covers, the training duration and level.

SRA Competences

- **A** Ethics, professionalism and judgement
- **B** Technical legal practice
- **C** Working with other people
- **D** Managing themselves and their own work

Length of training and prices

3 **3 hour course**
£112.50 + VAT Package price
£127.50 + VAT CLT Members / £255.00 + VAT Non-members

5 **5 hour course**
£187.50 + VAT Package price
£255.00 + VAT CLT Members / £510.00 + VAT Non-members

6 **6 hour course**
£225.00 + VAT Package price
£255.00 + VAT CLT Members / £510.00 + VAT Non-members

12 **2 day course**
£450.00 + VAT Package price
£510.00 + VAT CLT Members / £1020.00 + VAT Non-members

5 **5 hour Masterclass**
£187.50 + VAT Package price
£315.00 + VAT CLT Members / £630.00 + VAT Non-members

6 **6 hour Masterclass**
£225.00 + VAT Package price
£315.00 + VAT CLT Members / £630.00 + VAT Non-members

Webinars are 1 hour
£37.50 + VAT Package price
£65.00 + VAT CLT Members / £130.00 + VAT Non-members

Contents

Wills and Probate

Estate Planning, Trusts and Tax

Elderly and Incapacitated Adults

Related Courses

Webinars

Management & Personal Skills Courses

HOT TOPIC

Certificate in Will Drafting

5 B

Foundation

Rebecca Sharp

Area B of the SRA's competence statement states that practitioners should be able to 'obtain relevant facts', 'develop and advise on the relevant options' and 'draft documents which are legally effective and accurately reflect the client's instructions'.

With this in mind, this course is designed for those with little or no experience in will drafting to ensure that they can comply with area B in the context of will preparation. By the end of the course the delegate will feel confident in drafting not only simple, but also more complex wills and their ensuing due execution.

In particular it will deal with:

- Capacity and intention to make a will and how to resolve problems
- Appointment of executors
- Appointment of guardians
- Types of legacy and problems in drafting including: lapse, ademption and abatement
- Particular assets including – business assets – advantages, problems and pitfalls, the matrimonial home – how to protect the surviving spouse's rights of occupation
- Drafting residuary gifts: how to avoid a partial intestacy
- Trusts: types, uses and taxation
- Trustees' powers in the light of the Trustee Act 2000: are express powers still necessary?
- Formalities and solicitor's duty in relation to execution
- Tax efficient will drafting
- Some common howlers

Excellent introduction to the world of wills.
I now feel confident to take instruction and draft wills.

Bristol	*19 Sep*
Manchester	*25 Sep*
London	*22 Oct*

BEST SELLER

Will Drafting Masterclass

5 B

Masterclass

Lesley King

In a time of increased competition and legislative changes, anyone preparing wills needs to be confident in the quality of the product offered. This practical course is designed to allow practitioners to take a fresh look at their drafting practices, particularly in the light of recent legislation and case law.

Mini-case studies and suitable precedents will accompany the materials and there will be opportunities for questions and discussion. The course will also provide a thorough review of negligence and best practice.

Session 1: Taking Instructions: What do You Need to Know?

- Details of property owned including examination of case law surrounding proprietary estoppel, constructive/ resulting trusts and bank accounts
- Details of family and dependants including possible claims under I(PFD) A 1975 *Ilott v Mitson*
- Any reason to question capacity/ consider undue influence?

Session 2: Planning the Will

- Spouses and children including advantages and disadvantages of using the transferable nil band, residence nil rate band, discretionary trusts and IHTA 1984, s.144 and flexible life interest
- Cohabitees and children
- Opportunities and pitfalls of using pilot trusts?
- Property eligible for BPR
- Are mutual wills ever a good idea?

Session 3: Will Drafting

- Topping: revocation and foreign wills (EU Succession Regulation considered) and will in expectation of marriage/ formation of civil partnership
- Tailing: signature on behalf of testator and special attestation clauses
- People: executors and trustees, partners in firm, charging clauses, IHTA 1984, s.144 problems, exemption clauses, self dealing and guardians
- Beneficiaries including survivorship clauses, charities and Wills Act 1837, s.33
- Non-residuary gifts
- Specific legacies
- Residuary gifts
- Reduced rate for charities
- Administrative Provisions

£187.50 + VAT Package price
£315.00 + VAT CLT Members/£630.00 + VAT Non-members

London	*20 Sep, 3 Dec*
Southampton	*2 Oct*

Wills and Probate Update 2019

5 A Update

Lesley King

This course will acquaint private client practitioners with recent developments in the areas of will drafting, construction and interpretation, trusts and probate practice and related tax issues to ensure practitioners can apply these developments to their daily practice and be able to discuss the changes in an informed way with colleagues and clients. It will also look ahead to future developments.

The course will cover:

- Wills, trusts and probate cases and developments
- IHT cases and developments
- Miscellaneous Tax issue
- Future developments

Admirably clear and comprehensive exposition of a wide range of will and probate issues. First class!

Newcastle	*23 Sep*
Birmingham	*10 Oct*
London	*25 Oct*
Southampton	*28 Oct*

Digital Assets: Planning in An Online World NEW

3 A B Intermediate

Ian Bond

Facebook, Instagram, Bitcoin – all things that might not be at the forefront of your conversations with your private clients at the moment, but as the 'Generation Xers' and 'Millennials' get older, and thoughts of mortality creep in, these are likely to be hot topics of discussion. Like it or not much of our lives, both professional and personal, has found its way into the digital sphere. It is now important for all practitioners to consider and discuss with their clients what will happen to their digital estate on their death.

Get up to date and stay ahead of the competition as this three-hour course covers the practical and the legal aspects of a digital demise, including:

- What are digital assets
- What the law says on who actually owns digital assets
- Dealing with digital assets in the will making process
- Who has access to those digital assets on death
- Examples where fiduciaries have struggled to gain access to digital assets on death
- The issues in locating and accessing digital assets after the death has occurred
- How the law in this area needs to be updated to keep pace with technology
- Discussing the recent proposals from the Law Commission on bringing the law of wills into the 21st century

Manchester	*25 Sep pm*
Southampton	*17 Oct pm*
Bristol	*25 Oct pm*

HOT TOPIC

A Practical Guide to Variations and Disclaimers

3 B Intermediate

Rebecca Sharp

Following the government's decision in 2015 not to restrict how deeds of variation are used for tax purposes, post death variations continue to be a very important tool for re-arranging the estate of deceased persons both for tax reasons or to achieve a more equitable distribution and potentially avoid litigation. Case studies and delegate participation ensure that after attending this course, practitioners are aware of the requirements for after death variations to be effective, when each type should be used and the tax consequences of the different types of variation.

This course will cover:

- Deeds of variation vs disclaimers
- Inheritance (Provision for Family and Dependants) Act 1975
- Precatory trusts
- Requirements and scope of the arrangements
- Tax consequences and tax planning
- Transferable nil rate band
- Tips and traps

Manchester	*15 Oct pm*
London	*9 Dec pm*

HOT TOPIC

A Tricky Business: BPR and APR Explained

3 B Intermediate

Rebecca Sharp

The availability of BPR and APR can provide some welcome tax planning opportunities for your clients, both during their lifetime, and upon death via their will. However, the legislation can be tricky to understand and whether or not the reliefs apply can sometimes be unclear.

Suitable for all private client practitioners with business or agricultural clients, this fresh new course will ensure that you leave with a thorough grip on the issues at hand by examining not just the theory, but how the law is applied by HMRC in practice.

Points covered will include:

- What does the legislation say and what is HMRC looking for?
- Trading businesses v investment businesses
- Caravan sites and holiday lettings
- APR on farmhouses – including functionality test
- The relationship between APR and BPR
- Trusts
- Entrepreneur's Relief
- Tax planning opportunities via the Will and lifetime gifting
- Examination of recent cases

Manchester	*12 Sep pm*
London	*17 Oct pm*

Certificate in Probate and Administration of Estates

12 B

Foundation

Anthony Miller

This is a structured two day course designed for those practitioners wishing to gain a good practical grounding in this field.

It is suitable for trainees and newly qualified solicitors who have had little or no grounding at the academic stage, for those returning after a career break and those wishing to change specialisms. This course covers all aspects post-death through to finalisation of the estate:

- Good overview of steps in an administration
- Personal representatives: different types, their duties and authority and options available
- The initial interview: who is my client? What is my general duty to my client?
- Taking instructions: information required, immediate practicalities to address
- Setting up the file; initial letters; organising and managing the file
- Obtaining information about the estate and ascertaining beneficial entitlement
- Property passing outside the will or intestacy: 'jointly owned property'
- Is there a 'will?' Is it the last will? Are the clauses valid? Is it admissible to probate?
- Entitlement on intestacy
- Preparing the papers to lead to the grant: Responsibilities of Personal Representatives; Form IHT 400, calculation and payment of IHT, and raising funds to meet IHT liability
- Completion of Oath for common form Grants: Probate, Letters of Administration with the will annexed and Letters of Administration
- Other evidence: affidavits of due execution, plight and condition and identity
- Administering the estate: collecting in assets, paying debts and legacies, settling deceased's tax liability to date of death
- Tax during the administration of estate: PRs liability, payments to beneficiaries during the administration and disposals during administration
- Finalising IHT, corrective accounts and obtaining Clearance Certificate
- Finalising the administration: Estate and Distribution Accounts, transfer to beneficiary entitled
- Inheritance (Provision for Family and Dependants) Act claims
- Post-mortem tax planning

Newcastle	*8 - 9 Oct*
Birmingham	*15 - 16 Oct*
London	*26 - 27 Nov*

BEST SELLER

Practical Probate: The Works

6 B Foundation

Linda Pratt

This course will give a detailed and reassuring overview of the complete process of handling an estate in a cost efficient manner without compromising client service. A winning combination!

- Taking instructions: who is your client and who is not
- Ascertaining details of assets for both probate and tax purposes, taking control and identifying type of ownership of the assets and establishing liabilities of the estate
- Establishing a client led step by step procedure to confidently handle the estate information received throughout the whole administration of the estate, resulting in an excellent relationship between you and your client
- Establishing the validity of the will/status under intestate succession, and preparing and completing through worked examples the Oath and HMRC accounts (full copies and supporting documentation provided)
- Collecting in, transferring the assets, settling debts/liabilities from the correct assets of the estate
- Distribution under the intestacy rules or terms of the will, interim distributions and missing beneficiaries
- Finalising the administration preparation of estate accounts, obtaining client acceptance of your legal fees, tax vouchers and vesting of estate assets

Sheffield	*27 Nov*

IHT400: A Practical Guide

3 B D Intermediate

Rebecca Sharp

This practical and interactive half day course is a must for anyone involved in probate practice that is required to complete form IHT400. Our expert, Rebecca Sharp is more than happy to answer your questions, so there really is no need to struggle with this form any longer! The course deals with a number of quirky issues that can arise from the assets and liabilities of an estate and their subsequent impact on the IHT400.

These include:

- What is the estate and how to value it
- Exemptions and reliefs
- Grossing up
- Transferrable and residence nil rate band
- Amendments
- Making mistakes and penalties

This has been very helpful as a reminder and update as well as very detailed technical notes which will be useful on a day to day basis.

Leeds	*26 Sep am*
London	*17 Oct am*

BEST SELLER

Contentious Probate and Will Disputes: Developing Your Knowledge

5 A B

Foundation

Richard Land

Unlike some other litigation, contentious probate and will disputes are increasing year on year. This course is designed for litigators who wish to develop their knowledge in this field and enable them to start to build a practice in an area which is both interesting and challenging in equal measure.

The course will cover both legal and practical issues:

- Different types of claim
- Probate and intestacy
- Standing searches, caveats, warnings and appearances
- Challenging a will
- Inheritance Act claims: factors to consider, pre-action steps, the effect of prenuptial agreements, dispositions intended to defeat claims
- Cost and case management
- When to mediate and when not to?
- Costs: usual rules and exceptions, Part 36 offers and conduct of parties
- Potential claims against solicitors for negligent will drafting and advice

The speaker was very engaging and relevant and involved the attendees to interact during the presentation.

Birmingham	17 Sep
Manchester	14 Oct
London	20 Nov

Contentious Probate: Current Issues and Problem Areas for Practitioners

5 B

Intermediate

Luke Harris

Contentious probate is an expanding area of practice. This course equips practitioners to advise personal representatives, beneficiaries and potential claimants with confidence and is equally suitable for contentious and non-contentious probate practitioners and civil litigators who seek a greater understanding of the issues involved.

It will include a review of developments and relevant case law over the last 5 years, a consideration of preparation of cases, and practical obstacles and how to overcome them.

The course will cover:

- The probate jurisdiction of the court
- Issues as to formal validity of wills: testamentary intention and due execution
- Probate claims based upon testamentary incapacity, want of knowledge and approval, undue influence and forgery
- Interest claims
- Evidence
- Practice and procedure in probate claims
- Costs in contentious probate claims

London	25 Sep
Newcastle	3 Dec

BEST SELLER

Private Client Conversion Course

27 A B

Intermediate

Caroline Bielanska, Linda Pratt, Rebecca Sharp and Ian Bond

This course is designed to bring delegates up to a basic level of competence in private client work. It is suitable for practitioners in any field wishing to change specialisms and also for trainees as it assumes no knowledge at the outset. There will be practical exercises and case studies throughout with plenty of opportunity for questions and discussion.

Accompanying the course materials will be a resources pack with forms, guidance and other materials. Due to the introductory nature of the course and the fact that only the basics are covered, it may be necessary to attend some of our other courses for more advanced training.

Day 1: Will Drafting and Basic Tax
Includes structure and specific clauses, IHT and CGT and variations and disclaimers.

Day 2: Trusts
Includes principles and essential elements for creating trusts, taxation, drafting lifetime trusts and a look at the intestacy rules.

Day 3: Advising Elderly Clients
Includes the Mental Capacity Act 2005, the Code of Conduct, assessing mental capacity, Lasting Power of Attorney forms and nursing care funded by NHS.

Day 4: Probate and Administration of Estates
Includes, property passing outside the Will/intestacy, preparing the IHT205/IHT400, oaths, tax during the administration of estate, finalising IHT and estate accounts.

Day 5 AM: Workshop of Practical Exercises and Case Studies
This will provide an opportunity to review your learning over the course and look at detailed case studies with worked examples. Feedback from earlier events shows this is a much needed exercise in consolidation.

Day 5 PM: Fee Charging for Private Client Work
Using the course case studies Linda will explain her approach to the challenging exercise of setting an effective fee charging structure.

£1012.50 + VAT Package price
£1147.50 + VAT CLT Members/£2295.00 + VAT Non-members

London	*25 - 29 Nov*
Birmingham	*2 - 6 Dec*

BEST SELLER

Certificate in Trusts

12 B D

Foundation

Ian Bond and Stephanie Churchill

This course will equip private client practitioners with all the knowledge they need to tackle the topic of trusts with confidence. Suitable for trainees, newly qualified solicitors, those requiring a refresher and anyone who needs to be confident in providing advice relating to trusts, this course covers trusts from start to finish; from deciding upon the most appropriate form of trust for the client's needs, right through to the distribution to the beneficiaries.

Under the SRA Competence Statement, amongst other things, solicitors need to show they can 'maintain the level of competence and legal knowledge needed to practise effectively, taking into account changes in their role and/or practice contexts and developments in the law', 'draft documents which are legally effective and accurately reflect the client's instructions' and 'plan manage and progress legal cases and transactions'. Rest assured, this course will help you demonstrate competency in these areas.

Day One

Topics covered include:

- Aims, purposes and types of trusts
- Powers and duties of trustees
- Administering the trust effectively
- Trustee liability and overview of litigation
- Termination of the trust; death of beneficiary, achieving contingencies, by exercise of trustee powers, apportionment, tax issues
- Checklist prior to completion/closure of trust

Day Two

This part of the course will cover:

- Income tax and capital gains tax: tax payable on trust income and the burden of this tax on trustees and beneficiaries
- Inheritance tax: the rules for both interest in possession trusts and those trusts which are subject to the Discretionary Trust (relevant property) regime, whether created in lifetime or by will, and how IHT is calculated for all types of trust.
- Trusts and Financial Planning: including types of trust and uses, trusts for testator's family and children, and accumulations of income

Birmingham	*4 - 5 Nov*

Producing Estate Accounts Made Simple: A Workshop

3 B Foundation

Mark Vickers

This practical, half day course is aimed at practitioners who are involved in the day to day administration of estates. It provides guidance in the use of basic accounting techniques and the sources of information necessary in the production of estate accounts. Our speaker will give you the knowledge and understanding you need to prepare estate accounts as well as how to communicate effectively with accountants, executors and beneficiaries.

Topics covered include:

- Completion of the Estate at Death (Capital 1) Account from data extracted from forms IHT400/IHT205
- Completion of an analysed cash account sourced from the client ledger
- Completion of the Estate Capital (Capital 2) Account
- Amendments and adjustments to the net estate
- The treatment of Inheritance Tax, Administrative expenses and specific and general legacies
- Completion of the Estate Income Account
- The Distribution Statement and Investment Schedule
- The Balance Sheet

London	22 Oct am

Producing Trust Accounts Made Simple: A Workshop

3 B Foundation

Mark Vickers

This half day course is aimed at practitioners who are involved in the day to day administration of trusts. It provides guidance in the use of basic accounting techniques and the sources of information necessary in the production of trust accounts. Our speaker will give you the knowledge and understanding you need to prepare trust accounts as well as how to communicate effectively with, accountants, trustees and life tenants.

Topics covered on this course include:

- Components of a Trust Balance Sheet
- Revaluation of Trust investments
- Realization of Trust investments
- The updating of the analysed cash account sourced from bank transactions
- Updating the Trust Capital Account
- Updating the Trust Income Account
- The treatment of administrative expenses
- The Distribution Statement and the Investment Schedule
- The closing Trust Balance Sheet where appropriate

A very useful overview to help in connection with the preparation of Trust Accounts

London	22 Oct pm

Certificate in Private Client Tax NEW

5 A B

Foundation

John Bunker

Private client practitioners, and anyone involved in the administration of estates or the provision of tax and estate planning advice, need a sound grasp of the three main taxes that feature in their day to day work: Inheritance Tax (IHT), Capital Gains Tax (CGT) and Income Tax.

Presented by John Bunker, Solicitor and Chartered Tax Advisor, this course provides you with a sound grasp of the taxes and how all three interact and should be considered together when advising your clients in an easy to understand manner. Suitable for trainees, newly qualified solicitors, those changing specialisms, accountants, financial advisors or anyone requiring a refresher, this five-hour course promises to be a valuable investment of your time.

Topics covered include:

IHT:

- Principles of taxing estates, aggregable trusts and lifetime gifts
- Simple calculations
- Exemptions and reliefs including APR, BPR, Nil Rate Band, Residence Nil Rate Band
- Grossing up
- Valuation issues
- Lifetime exemptions and planning to minimise IHT
- Online resources from HMRC to help
- Anti-avoidance rules
- Key features of taxation of will trusts and lifetime trusts
- Variation of estates and trusts in two years post death

CGT:

- An introduction to CGT
- Lifetime gifts and on death
- Gains and losses in Estates
- Hold-over relief: some basics

Income Tax:

- An introduction to IT
- Allowances and rates
- Income of administration period
- The interaction of the three taxes
- Self-assessment principles
- Complex estates and trusts needing to register on the Trust Register

London	*28 Nov*

Tax Doesn't Have to be Taxing: A Masterclass NEW

5 A B

Masterclass

John Bunker

This is an advanced course which can either build upon our Certificate in Private Client Tax course, or act as a standalone for those confident in the basics who want to get into the nitty gritty of technical private client tax planning. This course addresses key issues around IHT and CGT planning in relation to mainstream private client work, particularly issues arising in estates and trusts.

Interactive and including case studies, it features many practical planning tips that should help you advise clients, including those inheriting residential properties or holding interests in trusts. Extended from a three-hour to a five-hour course by popular demand, this course is packed with content and discussion to make it an informative and unmissable day.

- IHT Residence Nil Rate Band (RNRB) basics including downsizing relief
  - Planning to maximise the use of RNRB and to mitigate the loss of RNRB for estates over £2m
- IHT Nil Rate Band Discretionary Trusts: exploring when and how to use NRB D/Ts as they make a 'comeback' due to RNRB; together with the effective use of exemptions and reliefs in lifetime and will planning.
- Transferable Nil Rate Band and the interaction with using the Nil Rate Band
- Lower rate (36%) of IHT if 10% of net estate to charity
  - Understanding the component parts, and merger of components
- Deeds of Variation: planning issues around variations
  - including use of the Nil Rate Band & NRB D/Ts and the 36% rate
  - rearranging trusts within two years of death using s. 144
- CGT Main residence relief: the key rules and some planning issues arising
- SDLT: the 3% higher rate for additional properties & how it works
  - Planning issues, especially with estates (properties inherited) and trusts
- Pensions death benefits: the tax rules
  - Planning issues arising alongside drafting wills, and estate administration, and the future for spousal by-pass trusts.

£187.50 + VAT Package price
£315.00 + VAT CLT Members/£630.00 + VAT Non-members

London	*11 Dec*

BEST SELLER

The Older Client: A Masterclass

6 A B

Masterclass

Sheree Green

The implications of working with clients in the early stages of dementia, or vulnerable due to bereavement or other influences will be explored, with use of case studies and sample precedents. Ample opportunity will be given for questions and discussion, and the course will allow for thorough consideration of the relevant ethics and duties of the solicitor where issues of capacity and undue influence may arise.

Session 1: Lasting Powers of Attorney
Successful drafting and common pitfalls focusing on:

- Taking instructions
- Choice of attorneys
- Issues regarding joint, joint and several and replacement attorneys (*Re Boff* (COP) case 12338771)
- Use of restrictions, conditions and guidance
- Role of Certificate Provider
- Confidentiality & 3rd party involvement
- Duties to the attorney
- Concerns of financial abuse (*The Public Guardian v JM* [2014] EWHC B4 (COP))

Session 2: Statutory Wills

- Initial considerations
- Making the application including the draft will
- Respondent sensitivities (*Re AB* [2013] EWHC B39 (COP))
- Best Interests (*NT v FS* [2013] EWHC 684 (COP)

Session 3: Sharing a Home
Hoping for the best, yet planning for the worst.

- Informal arrangements (*JS v KB, MP* [2014] EWHC 483 (COP))
- Pooling to purchase
- Paying for the extension
- 'Move in to look after me, and the house will be yours' (*Bradbury v Taylor & Burkinshaw* [2012] EWCA Civ 1208)
- The role of the 'family solicitor'
- Drafting challenges
- Tax matters

Session 4: Gifts

- Minimising the risks
- Anti-avoidance
- Lifetime gifts from settlements (*Re JDS:KGS v JDS* [2012] EWHC 302 (COP) and *Re AK* (Gift Application) [2014] EWHC B11 (COP)
- 'De Minimis' (In the Matter of GM (Case number 11843118))

£225.00 + VAT Package price
£315.00 + VAT CLT Members/£630.00 + VAT Non-members

London	*18 Sep*
Leeds	*9 Oct*

Certificate in Court of Protection Practice

5 A B

Foundation

Caroline Bielanska

Suitable for newly qualified solicitors, those returning after a career break or those private client lawyers who need to offer a service to clients in order to meet the demand for Court of Protection applications, this course covers everything from marketing and practice opportunities, to sample forms and a case law update.

Delegates will leave with the skills to tackle the range of applications with confidence.

The SRA Competency Statement area A says that solicitors should maintain an adequate and up-to-date understanding of relevant law, policy and practice and Area B looks at technical legal practice including drafting documents which are legally effective and states that solicitors should plan, manage and progress legal cases and transactions. With this in mind, plus the fact that a large proportion of applications submitted to the Court of Protection contain errors, this course has been designed to help you eliminate these errors.

This course helps achieve competency by covering the following areas in easy to understand detail:

- Basic applications and wider applications
- The court's jurisdiction and functions of the office of public guardian
- When to apply to the court for a welfare/financial decision
- The application and procedure for the appointment of a deputy
- The application and procedure for single orders
- Sale and purchase of property
- Trustees' applications
- Gifts, settlements and statutory wills
- Making decisions as a deputy
- Making the most of state support
- Getting paid

London	*23 Sep*

Statutory Wills from Start to Finish

3 B Intermediate

Simon Hardy

A statutory will can be a useful tool where a client has lost the mental capacity to make a will in the usual way but their circumstances are such that a will is required. These circumstances could include scenarios such as where the client has no existing will and the intestacy rules do not provide a desired outcome, or where there is an existing will but this needs updating due to a change in circumstances like the estate growing or reducing in value, or for tax planning purposes.

This half day course will give you all the information you require to decide whether a statutory will is needed at all and the procedure involved in obtaining one. Full of drafting hints and tips, as well as reference to recent case law, this course is a must for anyone involved in the statutory will application process.

Points covered will include:

- Initial considerations, is a will needed?
- Making the application including the draft will
- The mentally incapacitated client – do they have a role?
- Best interests and section 4 Mental Capacity Act 2005 considered
- Recent case law analysis

Birmingham	*7 Oct pm*
London	*15 Oct pm*

Mediation at the Court of Protection for Mediators

6 B C Intermediate

Craig Ward

This course is aimed at practitioners who already have a mediation qualification. It aims to alert them to the key issues when running a mediation involving vulnerable adults or where adults lack mental capacity to decide for themselves.

Mediations with vulnerable adults or with someone who lacks capacity are mostly about safeguarding and also ensuring decision-making is taken by an authorised person in the Donor/P's best interests. Where someone lacks capacity, there is the necessity to closely follow the Mental Capacity Act and ensure their involvement in the mediation process.

The course is based on the work conducted by Braun [2013] who amalgamated several pieces of research on training mediators; ACR Training (2002), Ward (2009) and EGN Report (2012) to produce a training template. The day ends by going through a vulnerable adult mediation.

The course aims to examine the following topics:

- The psychology of decision-making in later life
- Vulnerable adult mediations law
- Theories of ageing
- Understanding mental capacity
- Recognising abuse
- Mediation ethics
- Running a vulnerable adult mediation

Manchester	*8 Oct*
London	*5 Nov*

Mediation at the Court of Protection for Non-Mediators

3 B C

Foundation

Craig Ward

This course is aimed at practitioners who are not themselves mediators, but practice in areas involving elderly clients and individuals lacking mental capacity. The course aims to alert them to when a vulnerable adult mediation may be suitable, what happens at a vulnerable adult mediation, together with their involvement in the process.

Mediations with vulnerable adults or with someone who lacks capacity are mostly about protecting a vulnerable adult's interests and a lso ensuring decision-making is taken by an authorised person in the Donor/P's best interests. Where someone lacks capacity, there is the necessity to closely follow the Mental Capacity Act and ensure their involvement in the mediation process.

The course will aim to cover the following topics:

- Varieties of elder mediation
- Pre-mediation interviews
- Party and family dynamics
- Mediating with and without mental capacity
- Applying the Mental Capacity Act 2005
- Spotting elder abuse
- Managing vulnerable adults' needs

Manchester	*16 Oct pm*
London	*3 Dec pm*

Drafting Commercial Lasting Powers of Attorney

3 B

Intermediate

Craig Ward

Company and Private Client Lawyers take heed! Legislative changes concerning company directors say; if they lack mental capacity they may not necessarily now be removed. This creates a quandary for a company, particularly their attitude to risk. Doing nothing could endanger the company; creating a Commercial LPA reduces the risk. Commercial LPAs can be used to manage decisions where a director is unavailable or away on business, just like an ordinary LPA or where they become incapacitated for longer periods of time or lack mental capacity.

This course will take solicitors through relevant company law; identifying business structures and drafting Commercial LPAs. Showing how different areas of law impact and how best to advise a company on making a Commercial LPA.

This course will cover:

- Personal & commercial LPA clashes
- Directors: problems and removals
- Taking instructions
- Checking & adjusting business structures
- Applying current case law
- Drafting a Commercial LPA

Leeds	*26 Sep pm*
London	*13 Nov pm*

Residential Property: An Intensive Introduction for Qualified Practitioners

6 B Foundation

Lorraine Richardson

This intensive and practical course is aimed at those qualified practitioners looking to change practice areas (for example, due to Legal Aid cuts) or for those returning after a career break. No prior knowledge of conveyancing (residential or otherwise) is required!

This course gives you a practical overview of residential conveyancing, and highlights the frequent pitfalls that you are likely to deal with, including:

- An overview of the conveyancing transaction
- Identifying your client and the source of funds – why this is your responsibility
- Review of searches available in the market – online or paper based?
- Conveyancing Quality Scheme – what is it all about?
- The Protocol and the new forms
- Key risk areas – CML and your duty to the lenders
- What is SDLT? how does it differ from Stamp Duty?
- Standard Conditions of Sale (5th edition)
- Changes in Land Registry pr actice – official copies of the land register replacing office copies

London	*17 Sep*

Handling the Average Money Divorce

5 B C D Foundation

Mena Ruparel

Make the most of limited resources and resolve cases quickly and effectively.

This course takes you through the whole process of dealing with a financial remedy case from the preparation of the Form E, analysis of the 'usual' financial disclosure, through to preparing the negotiation correspondence to try to settle the case.

This course will include:

- How to fund the average case post LASPO
- How and when to use voluntary disclosure, mediation, collaborative law and arbitration
- How to manage the client's expectations from first instruction onwards
- How to apply Section 25 Matrimonial Causes Act criteria
- Analysing financial disclosure
- How to identify and narrow issues prior to the First Directions Appointment
- Instructing experts; property and pension valuations
- Approaches for dealing with pensions and maintenance
- Negotiation handling

This course is designed for any practitioner in their first few years of family work.

Birmingham	*9 Oct*
Manchester	*11 Oct*
London	*24 Oct*

Charity Land Transactions

3 B Advanced

Jane Lonergan

This course guides you through the obligations and requirements which apply on the acquisition, mortgage or disposal of land where charities are involved. It is suitable for all who advise charities or the parties who deal with them.

The course covers the Charities Acts of 1993 and 2006 and the consolidating legislation in the Charities Act 2011 and will look at:

- Charities - introduction for property lawyers
- Disposals by a charity and ss.117-121 Charities Act 2011
- Mortgages by a charity and ss.55, 124-126 Charities Act 2011
- Acquisitions by a charity
- Commercial leases generally and specific issues for charities
- Official custodian for charities – s.122 certificates
- Some common issues, including title issues

A very knowledgeable presenter and very engaging course

London	*16 Oct pm*

The Role and Duties of the Charity Trustee

3 A B Foundation

Mark Cardale

High profile failures of charities and additional powers to remove, suspend and disqualify trustees have thrown a new focus on the role, duties and responsibilities of the charity trustee.

Charity trustees often have no previous experience as trustees or in the running of organisations, and their role may be extensive and the responsibilities demanding. There are various good practice codes which may apply but there is a potentially daunting amount to assimilate.

This half-day course will be of interest and benefit to all those advising charities and their trustees, trustees themselves, and chief executives and other professionals working within charities.

The course covers:

- The legal rules concerning eligibility to become a charity trustee
- The legal duties of trustees
- The trustees' core duty to fulfil the charity's purposes for the public benefit
- Further duties of accountability, reporting, the protection of charity property, risk management and succession planning
- The role of the Charity Commission, Charity Commission guidance on trustee responsibilities
- The new rules in the Charities (Protection and Social Investment) Act 2016 relating to social investment and to fundraising

London	*6 Dec pm*

Webinar Highlights

One hour webinars are the perfect way of expanding expertise and supplementing face-to-face training. To see our full range of webinars visit **www.clt.co.uk/webinars**

A B Update

Contentious Probate Case Round-Up 2019

Edward Hewitt

Join our expert, Edward Hewitt, for an exploration and practical digest of recent case law in the contentious probate arena. Cases covered will depend on recent developments, but are likely to include *Chin v Chin, Re Cowan* and *Bhusate v Patel*.

A B Update

LPAs - Still Useful?

Alan Robinson

LPAs, by their very nature, are open to a degree of abuse, and clients may be concerned that they will have control taken from them. This webinar looks at helping clients to make the best use of LPAs.

A B Update

Care Act Update 2019

Alan Robinson

This webinar will consider recent developments in case law on community care, and also those issues which remain unresolved.

B Intermediate

Will Planning for Modern Families

Lesley King

Families come in all shapes and sizes. A private client solicitor should be able to draft wills and provide associated advice for all clients with confidence and understanding, not just those who fit the 'traditional family' model. This webinar explores the particular drafting complexities and planning difficulties that can arise from co-habiting couples, same sex marriages, those on second and third marriages and lesbian, gay and transgender families.

A B Update

Mental Capacity & Court of Protection Spring 2019 Update

Caroline Bielanska

This webinar offers an update on the very latest developments in Court of Protection and Lasting Powers of Attorney. It will provide you with a practical digest of recent and upcoming case law, key changes to legislation and other events of relevance to both you and your clients.

B Update

Essentials: What's New in Wills and Probate 2019

Lesley King

This webinar offers an update on the very latest developments in wills and probate. It will provide you with a practical digest of recent and upcoming case law, key changes to legislation and other events of relevance to both you and your clients.

A Intermediate

Undue Influence and the Older Client

Patricia Wass

This webinar will explore the role of the practitioner in recognising and responding to the possibility of undue influence, by examining relevant case law, considering practical examples, and outcomes focused conduct requirements.

A B Update

End of Life Decisions

Patricia Wass

End of life issues continue to have a regular presence in the media. With the Court of Appeal recently ruling that the high court should hear the case of Noel Conway, a motor neurone disease sufferer, challenging the ban on assisted dying, it is likely that interest in this topic will continue to grow. As professionals we need to have an understanding of the law presently in place and the factors that may change it.

B

Intermediate

Deliberate Deprivation for Social Care

Caroline Bielanska

- What is a deliberate deprivation?
- Establishing purpose
- Relevance of timing
- Freedom to make gifts
- Local authority decision making in practice
- Recent local government ombudsman cases
- Care provision when there has been a deliberate deprivation

B

Intermediate

Cross-Border Estate Administration in One Hour

James Ward

Our expert, James Ward, has extensive experience of dealing with estates with an overseas element and in this one-hour webinar, he covers the main points for practitioners to be aware of.

B

Foundation

An Introduction to Mental Health Law

Alan Robinson

A must-view for anyone requiring an introduction to the area of mental health law.

B

Foundation

Law and Benefits for Carers

Alan Robinson

The Care Act 2014 introduced new rights for carers in England and there are also equivalent rights for carers in Wales. This webinar explains the range of entitlements for carers.

Management and Personal Skills Training

Management and Strategy

6 A C D — Intermediate

Preparing for Partnership

London *11 Nov*

12 C D — Advanced

Two Day Law Firm Management Masterclass

London *3 - 4 Dec*

6 C D — Advanced

Management Course Stage 2: Developing the Manager

London *8 Oct*

People Management

6 A B C — Foundation

Legal Aid Supervision: An Introduction

London *17 Sep*
Birmingham *8 Oct*

6 D — Intermediate

Supervision: Essential Skills for Lawyers

London *23 Oct*

6 D — Intermediate

Managing and Motivating People

Birmingham *8 Oct*
London *15 Oct*

6 D — Intermediate

Performance Management in Legal Practice

London *26 Sep*

6 B — Update

Performance Management and Capability Procedures: Making Them Work

London *24 Sep*

Financial Management

6 A — Foundation

Understanding and Interpreting Company Accounts

Manchester *17 Oct*
London *28 Oct*

5 C — Intermediate

SRA Accounts Rules: Achieving Compliance

London *19 Sep*

3 A C — Update

Getting to Grips with the New SRA Accounts Rules

Birmingham *17 Oct pm*
London *24 Oct pm*

Compliance

3 A — Update

SRA Handbook: Are you ready for the changes?

Bristol *10 Sep pm*
Cambridge *2 Oct pm*
Carlisle *16 Oct pm*
London *16 Oct pm, 6 Nov pm*
Birmingham *31 Oct pm*

3 A — Update

Money Laundering Compliance in Private Practice

Leeds *11 Sep pm*
Birmingham *18 Sep pm*
London *24 Sep pm*

6 A Foundation

COLPs, COFAs and Managing Compliance 2019

Birmingham *2 Oct*
Manchester *3 Oct*
Leeds *15 Oct*

6 B Foundation

An Introduction to Data Protection and GDPR

London *18 Sep, 4 Dec*
Cambridge *3 Oct*

6 B C D Intermediate

Duties of the Data Protection Officer

London *23 Oct*

3 A Update

Data Protection and GDPR Update 2019

Manchester *12 Sep pm*
London *9 Oct pm*
Birmingham *30 Oct pm*

3 B D Foundation

Data Protection: Conducting a Data Audit

London *16 Oct am*

3 B C Foundation

Data Protection: Privacy Notices, SARs, Consent and More

London *16 Oct pm*

3 A D Foundation

Data Protection and Cyber Security

Birmingham *23 Sep pm*
London *24 Oct pm, 10 Dec pm*

Personal Skills

6 C D Foundation

Case Analysis and Project Management for Junior Litigators

London *10 Oct*

3 C D Foundation

Preparing For and Conducting Negotiations

London *18 Sep am*
Manchester *15 Oct am*

3 B C Foundation

Advocacy and Persuasive Communication

London *18 Sep pm*
Manchester *15 Oct pm*

3 B D Intermediate

Drafting Legal Documents for Lawyers

London *19 Sep pm*
Birmingham *4 Dec pm*

6 B D Intermediate

Project Management for Transactional Lawyers

London *17 Sep*

5 C Intermediate

Getting the Very Most Out of Your Day

Birmingham *15 Oct*
London *19 Nov*

3 A C D Foundation

Effective Complaints Handling

London *12 Nov pm*

For In-House Lawyers

12 A B C D Foundation

Essential Toolkit for In-house Counsel

London *7-8 Oct*

6 C D Foundation

The Successful In-house Lawyer

London *16 Oct*

6 C D Advanced

The Successful Leader and Manager of an In-house Legal Team

London *17 Oct*

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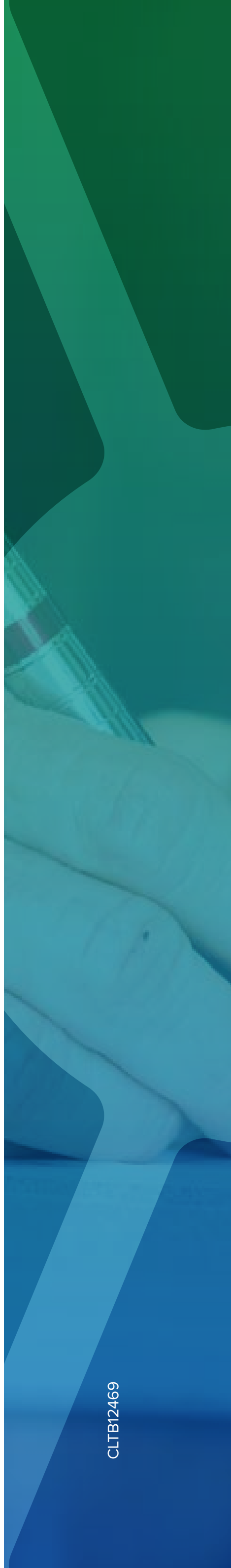

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