# Executors potential for the accountant in practice

### Tuesday 1 July 2014

### 13:30 to 16:30

### Ramside Hall Hotel, Carrville, Durham

This course is for anyone who wants to offer the complete service to clients by offering to be their executor. It is not aimed at solicitors but the accountant with a reasonable understanding of the various taxes who is looking to expand their “offering” to clients. Attendance on the course does not count towards the training required by the ICAEW to become an “Authorised” individual for probate work.

### Content will include

* Introduction and the opportunities – What are the ICAEW rules regarding licencing firms and how would you set out about becoming an Authorised Individual under their Probate Regulations
* Why should your firm look to offer these services
* Who can be an executor and how far you can go – including when you should involve solicitors
* Why have wills and, as a professional executor, what should we look out for?
* Planning points illustrated with practical examples
  + Getting the right structures - Will and lifetime planning using trusts
  + Thinking about what planning executors can do post death
  + The use of alternative structures instead of trusts to achieve similar results
  + Thinking “outside the box” to achieve results
* The six stages of probate – a brief introduction to demystify the process to see if it is something that you feel your firm should offer.
* Please note this course is an introductory course – it is to look at what is involved and why you should undertake this work – the course does not specifically count towards the training needed to satisfy the ICAEW that you have the competency to become an Authorised Individual – the course will outline how you may go on to achieve this.

**Booking:**

**Credit/Debit Card – Tel (0)1908 248159**

**Online Booking -** £84.00 inc VAT, Retired/not employed £42.00 inc VAT at icaew.com/northern events

**Postal Booking by cheque -** £90.00 inc VAT, Retired/not employed £45.00 inc VAT

For further information contact Joanne Lucking on 0191 300 0352 [joanne.lucking@icaew.com](mailto:joanne.lucking@icaew.com)

\*I/we would like to attend **Executors potential for the accountant in** **practice course on Tuesday 1 July 2014** (booking ref DNORSEM140701)

If paying for multiple attendees please insert the lead name below with details of others - name, organisation & membership number – overleaf.

Name: …………………………………Organisation:………………………...

E-mail: ………………………………… Tel:...............................................

Address: …………………………………………………………………………

………………………………………………………………Postcode: ……….

Institute Membership No. (if applicable): ⬜⬜⬜⬜⬜⬜⬜ Tick this box if you require a VAT Receipt ⬜ I wish to reserve ….... place(s) at the above seminar. I enclose my cheque for £…………… payable to “NSCA”