

PENSIONS & TAX PLANNING – THE WORLD TURNED UPSIDE DOWN.....

Wednesday 4 November 2015

13:30 to 17:00hrs

Greenhill Hotel, Wigton CA7 8LS

Pensions and tax planning

This course is aimed at partners and staff involved in the provision of advice to clients.

Content

The course will cover:

- Contributions – quantum and pitfalls – Lifetime limits, Annual Allowances, Employer contributions – a quick reminder
- Operation of the scheme including what happens on retirement
- Benefits including taxation problems
- Planning advice – not just register pension schemes:-
 - What else can you save into that could be tax efficient? What about Cash rich companies....
 - Why spend your pension when you could spend your ISAs?
 - Capital Tax planning in the light of the changes – is it more counter intuitive than you think?

Examples will be used to illustrate the rules and how they work in practice and the planning opportunities that ensue. In view of the number of changes above, the course will not be dealing with offshore pensions such as QROPs nor will it deal with Auto Enrolment.

Robert Trunchion MSc CTA FCA TEP. Bob is a tax partner with MHA MacIntyre Hudson and is the Head of Tax Training at MacIntyre Hudson Advisory Services LLP. He is a specialist in a number of industries or niches such as solicitors, farmers and the medical profession and on the professional indemnity insurance aspects of tax work. Bob has written a Tax Procedures Manual and has regularly contributed articles on technical tax subjects including a practice note on Capital Allowances for a major technical provider in the legal market. He has appeared on national radio and television talking about inheritance tax matters. He continues to be involved with clients on both a consultancy and portfolio basis.

After service in the Royal Navy, Bob qualified as a Chartered Accountant with Coopers and Lybrand (now PwC) where he specialised in corporate taxes. He joined MH in 1985 where, perforce, he had to deal with every shape and size of tax! He has been lecturing on tax for MHAS for over 25 years and has seen the scope and complexity of tax legislation go up by more than a factor of 10!

Credit/Debit Card Booking Tel 01908 248159

Online Booking - £84.00 inc VAT, Retired/not employed £42.00 inc VAT

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

Places can be reserved online at www.icaew.com/northern or by completing the form below - for further information contact Joanne Lucking on 0191 300 0532 joanne.lucking@icaew.com

The event will include refreshments.

I / We would like to attend Pensions & tax planning on Wednesday 4 November 2015.

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"

RETURN BY 21st OCTOBER TO: Charlotte Richardson, Dodd & Co, Clint Mill, Cornmarket
Penrith, CA11 7HW