



Speakers:

Anne Stephenson: The Principal of Stephenson Solicitors. She is a member of STEP, the DSBA Probate and Taxation Committee and Mental Health and Capacity Committee, the Probate Liaison Committee and the Probate Administration and Trust Committee of the Law Society. She lectures, examines and tutors on the Law Society's Professional Courses on the Wills Trusts, Probate, Tax Planning and Conveyancing Modules and on the STEP Diploma in Wills, Trust & Estate Planning. She also lectures on the Law Society's CLE Courses, and to the DSBA and numerous other professional bodies. She is the co author of the OUP Manual on "Wills Probate and Estates" 2006, and the OUP Manual on Conveyancing Volumes 1 & 2, 3rd Edition 2007 and the co-author of OUP Manual on Capital Taxation.

Brenda Slack: Solicitor with Stephenson Solicitors, a specialist practice providing advisory services for solicitors and financial institutions in the area of Wills, Trusts, Administrations and Tax Planning. She has over 10 years experience working in this area. Brenda is a Member of STEP and lectures on the STEP Diploma in Wills, Trust & Estate Planning and at the Stephenson Solicitor's series of lectures.

Finola O'Hanlon: Solicitor and Director of O'Hanlon Tax Limited which provides specialist advice on a broad range of Irish taxation issues. Finola is a fellow of the Institute of Taxation and a member of STEP and the DSBA Probate and Taxation Committee. She lectures and examines for the Law Society and the Institute of Taxation and is the joint author of the Institute's book on CGT.

Mary Condell: Consultant with the Porter Morris & Co, Solicitors and with the Law School in Capital Taxes and is currently Chairperson of STEP in Ireland. She is a qualified mediator and is a certified member of The Mediators' Institute of Ireland.

Rita Considine: Is a very experienced Junior Counsel practising in Chancery Probate and Succession Law. She lectures and tutors on the Law Society PPC II Course in the area of Wills Trusts and Probate.

Janet O'Byrne: Head of Probate Services with Bloxham Stockbrokers. She lectures on the Law Society's PPC II Course and is a member of STEP.

STEPHENSON SEMINAR



'Like the old saying goes,
gentlemen, where there's a will,
there's a loophole'

WILL DRAFTING FOR THE NEW DECADE: APPLYING NEW LEGISLATION AND UPDATING OLD SKILLS

DATE	Friday 23rd April 2010
VENUE	Westbury Hotel Grafton Street, Dublin 2
TIME	9.15a.m. to 5.00p.m.
FEE	€390.00 including Lunch



Stephenson Solicitors
55 Carysfort Avenue
Blackrock
Co. Dublin

This seminar will include the following:

- How the provisions of the *Land and Conveyancing Act 2009* effects the advice given to clients and its effect on the drafting of trusts of land, life interest trusts and discretionary trusts under a will and on the operation of such trusts.
- How the Nursing Homes Support Scheme Act, 2009 ("Fair Deal" legislation), the *Mental Health Bill 2008* and the Mental Capacity and Guardianship Bills 2007 & 2008 effects the advice given to clients re wills and the effect of the forthcoming Civil Partnership Act 2008 on taking instructions/will drafting/and tax planning.
- Effects of the *Finance Bill/Act 2010* - The impact on you and your clients.
- The effect of recent judicial decisions; *Elliott v Stamp 2008* and *Darby v Shanley 2009*.
- How to take "informed instructions" for a will and draft precise clauses to ensure that a testator's wishes are carried with the use of a virtually foolproof instruction sheet and precedent clauses.
- What steps should you take to advise the client and protect yourself and the estate when taking instructions and drafting a will where the testator wishes to exclude a spouse or child?
- How to draft clauses to supersede certain mandatory sections of the Succession Act to ensure that the testator's wishes are carried out.
- When to attach a list or map to a will and what will the Probate Office require in such cases?
- How to draft a bequest of shares in light of the consequences of the economic downturn i.e. the increased numbers of mergers, takeovers, acquisitions and liquidations of companies

- How to draft a bequest to a number of beneficiaries and how the wording of the bequest and the relationship of the beneficiary to the testator can radically effect the ultimate distribution of the asset, sometimes, contrary to the Testator's wishes.
- How to draft residuary/remainder clauses to ensure that a partial intestacy does not arise.
- How to draft an effective/valid charging clause and how then not to invalidate same.
- Bequeathing assets subject to a charge e.g. Mortgage/HSE.
- Drafting wills for Farmers- are SPS entitlements automatically included? CAT and drafting bequests of farmland.
- Trends in CAT reliefs and how to draft a will to maximise the use of Agricultural Relief, Business Relief, Favourite Nephew Relief, and Dwellinghouse Relief including; the new Rates & Thresholds – deciding what threshold should be used in relief cases (surviving spouse, inheritance from child etc.) – decision chart for ease of reference.
- New "place of supply" rules for VAT in 2010 – how to ensure that you are accounting for VAT correctly when providing Will drafting and estate services.

6 CPD hours apply (1 hour of which qualifies for management and professional development skills)

Sponsored By:

BLOXHAM

Application Form (Please complete in full)

Please detach and return this section to Stephenson Solicitors 55 Carysfort Avenue Blackrock, Co Dublin. Telephone: 01 275 6759 Email: stephenson solicitors@eircom.com with a cheque payable to Stephenson Solicitors.

Your name will be noted; you will not receive a reply unless there are no places available. If received by the 1st April 2010 cancellations will be accepted and a refund given, subject to an administration fee of €50.00. In the event of cancellations after this date the attendance fee is non refundable. Although it is hoped to be avoided, the right to substitute speakers, change timing, topics or venue is reserved.

Name

Address

Phone

Email