webinar invitation

Three Become One...

The importance of your personal advisers taking an integrated approach

BHP

Clarion

We would like to invite you to our webinar on Thursday 24th September. Our expert panel of speakers will guide you through all the legal, financial planning and tax considerations you need to think about when planning for the future and making important decisions about your private wealth. The panel will show the importance of having a team of private wealth advisers working collectively with you, and your family.

The webinar will be chaired by **Amanda Waterhouse** who leads the Northern tax team at BHP. Amanda works closely with her clients and their other advisers in order to provide the most seamless and valuable experience possible. She is experienced in structuring businesses to facilitate succession plans for business owners, including tax efficient exit plans for shareholders, and incentivising the future management teams of those businesses. The speaker panel joining Amanda includes:

- **Vivienne Wild, Partner, Clarion**
  Viv will be shedding light on some of the typical conversations she has with people when preparing their Wills, and on her proactive and enlightening strategy for this crucial topic. She will also be discussing some of the legal aspects involved with the tax planning work that other advisers carry out for individuals, highlighting the need for a collective approach.

  One of the leading private client solicitors in Leeds, Viv advises individuals on their estate and succession planning, in particular those with significant business interests or who are high earning professionals, dealing with their Will and trust requirements and advising on asset protection and UK inheritance tax.

- **Gareth Marland, Legal Director, Clarion**
  Gareth will be discussing what stops clients from making a Will, the consequences of not making a Will and Lasting Powers of Attorney.

  Gareth advises clients on their estate planning, inheritance tax, asset protection and Wills and how their hopes for the future can be reflected in their legal documentation. Clients include business owners and in particular farming families.

- **Joy Clegg, Head of Financial Planning, BHP**
  Joy will be demonstrating how the cash flow planning tool used by the financial planning team is critical to look at before any planning takes place.

  Joy has over 30 years' experience in the financial services sector. She works closely with individuals and business owners to help them meet their goals and objectives, ensuring they can live the life they want without fear of running out of money.

- **Suzy Harris-Milnes, Partner and Head of Private Client, BHP**
  Suzy will be discussing the tax elements that need to be considered when managing private wealth.

  Suzy has over 25 years' experience advising individuals on personal tax matters. Typically business owners, Suzy works with clients to ensure their tax affairs are structured in the most tax efficient manner and this involves working closely with the client and other advisors such as lawyers and financial advisers.

Thursday 24 September 2020

Start 11.30am

End 12.30pm

To register please follow the link:

https://us02web.zoom.us/webinar/register/WN_GIFCKh2GRomd6ycVYqMnLw

The webinar will be held via Zoom and there will be the opportunity for you to put your questions to the speakers during the session.
If you would like to submit a question now please email marketing@clarionsolicitors.com by Tuesday 22 September 2020.