

Breakfast seminar: Pensions and preserving assets for future generations in a tax efficient manner

Hosted by the Hegarty LLP Wealth Management & Tax Planning Team

With the end of the tax year approaching many will be considering the need to make pension contributions. It is therefore an ideal time to consider the other benefits afforded by planning for the future.

Topics to be covered:-

- The new pension rules and how the inheritance tax / death benefit rules work
- The options regarding your pension lump sum death benefit
- Using trusts to pass wealth in a tax efficient manner and preserve assets
- Using trusts for multiple pension schemes
- Other uses of trusts for preserving assets

**Tuesday 8th March 2012 at Hegarty Solicitors
Business Suite, 48 Broadway, Peterborough**

Registration & breakfast	7.40am
Seminar opens	8.00am
Seminar closes	9.15am

**Onsite parking by prior request
only - please book this when you
RSVP**

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Why you should attend:-

- If you are not armed with all of the options your estate may suffer unnecessary tax charges in the event of your death
- Pensions offer an opportunity to preserve assets for future generations (for example, did you know that if your spouse/civil partner continues in drawdown they will determine the devolution of the residual fund?)
- Hegarty LLP are specialists in this area and can provide a cost effective solution for your needs
- The seminar is free with no obligation. Why not come along and see what your options are? (and enjoy a free breakfast!)

About your hosts:-

Both speakers are highly qualified and experienced.

Greg Baker ACIB T.E.P.

Greg is a partner at Hegarty LLP and has over 30 years experience gained through employment with the private client departments of a major UK bank and an offshore bank as well as within the legal profession. He is a member of the Executive Committee of the Law Society's Private Client Section, a member of The Society of Trust and Estate Practitioners (STEP) and a full member of Solicitors For the Elderly (SFE). Greg advises on all types of matters, particularly complex circumstances, for example UK resident and non-UK resident clients with business interests, foreign assets and cross jurisdictional issues.

Joanna Grewer LL.B. T.E.P.

Joanna is an Associate Solicitor at Hegarty LLP and has considerable experience in wealth management and tax planning. Jo has significant experience of complex, high value cases and working with UK based clients who own agricultural property and/or businesses abroad. Jo specialises in the area of trusts law and care fee planning. She is a member of the Law Society's Private Client Section, The Society of Trust and Estate Practitioners (STEP) and Solicitors For the Elderly (SFE). Joanna is also a member of the Board of Age UK Peterborough.

RSVP To Angela Babb
By Friday 24th February 2012

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