

# Seminar: The importance of Inheritance Tax planning, and protecting your wealth

Thursday 5 October 2023

4.30pm - 7.30pm

Brampton Park Golf Club, PE28 4NF



**BOOK YOUR PLACE HERE**



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## Speakers

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### Barry Jefferd, FCA CTA TEP

Barry trained with a City of London practice where he qualified as a Chartered Accountant and a Chartered Tax Adviser and became a member of the Society of Trust and Estate Practitioners. Subsequently he joined George Hay and became responsible for establishing the Tax Department, which he still heads. He became a Partner in the firm in 1990 and Senior Partner in 2020. Barry advises on the complete range of taxes, though he particularly enjoys Capital Gains Tax, Inheritance Tax and property and land transactions. He became one of the first accountants in the country to pass the ICAEW's probate qualification, and leads on the delivery of non-contentious probate services via GH Probate Ltd. Barry also lectures widely on taxation, and often on behalf of Taxation Institutes providing training for other tax professionals.



### Tony Larkins, APFS CFP CMgr FCMI FCSI TEP

Tony is the founder of the Beacon Wealth Group which contains Beacon Wealth Management Ltd, Beacon Wealth Estates Ltd, Beacon Wealth Storage Ltd (and Hail Weston Pub, The Royal Oak). Wealth Management and Financial Planning are by far the largest part of the group and are based in Kimbolton. Tony has been providing financial advice for 31 years after having been an accountant for 10 years. His qualifications are many, and make him one of the most qualified advisers in the UK. He has gained experience for most scenarios affecting both private individuals and companies, older and younger.

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George Hay Chartered Accountants & Beacon Wealth Management Ltd invite you to join us at this upcoming seminar, where we will discuss the importance of Inheritance Tax planning, tax efficient transition of wealth, and how to protect all that you have worked hard for.

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## *Agenda*

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- 4.30pm Registration with Tea/Coffee
- 5.00pm 'IHT planning: Tips & Traps' by Barry Jefferd
- 5.40pm 'IHT: Protecting your wealth and planning for the future' by Tony Larkins
- 6.20pm A brief summary of Probate services by Barry Jefferd
- 6.30pm Q&A session
- 6.45pm Evening buffet and a chance to speak with our advisers

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