

# STEP Half-Day Conferences



## *Business Families Special Interest Group*

Monday  
1 December  
2014

STEP Offices, George Tasker Suite (7th Floor), Artillery House South, 11-19 Artillery Row, London SW1P 1RT, United Kingdom

### CONFERENCE

## The Family Business and Family Law

*In partnership with the International Academy of Matrimonial Lawyers*



#### EVENT FOCUS

The focus of this event will be on family businesses and wealthy families within the context of English divorce proceedings. We will explore the treatment of family businesses, trusts and family wealth generally within the framework of adversarial divorce proceedings. We will also consider matrimonial aspects of wealth planning including the increasingly important role of marital agreements, trusts and family governance documentation. There will be a session on valuing the family business for the purposes of financial proceedings. Finally we will look at family business orientated alternatives to traditional adversarial proceedings route including collaborative law, mediation and arbitration. The relationship between the wealth and family business advisers and the client facing divorce is at the heart of this event.

#### WHY ATTEND

This course is designed for private client lawyers, family lawyers and those advising family businesses. It will be an essential guide to the strategies and pitfalls in high – level divorce and the associated issues for all advisers.

1.00pm – 1.30pm

**Business Families Special Interest Group Annual General Meeting**

1.30pm – 2.00pm

**Arrival, Registration and Tea/Coffee**

2.00pm – 2.10pm

**Welcome Address and Introduction**

Chris Lintott TEP, Partner – Private Client, Penningtons Manches LLP and Chair, STEP Business Families SIG  
William Longrigg, Head – Family Sector, Charles Russell Speechlys LLP and President, IAML

2.10pm – 2.30pm

**Forum shopping, international divorce and the family business**

James Stewart, Partner – Family Law, Penningtons Manches LLP, Co – Chair, Collaborative Family Law (CFL), and Fellow, IAML

2.30pm – 3.00pm

**Business valuations “do you want figure high or low?”**

Mike Mason, Forensic Accountant, BDO LLP

3.00pm – 3.30pm

**Lifting the Corporate Veil following Prest**

Tim Amos QC, Leading Counsel, QEB and Fellow, IAML

3.30pm – 3.50pm

**The treatment of the family business in divorce**

Mark Harper, Partner – Family Law, Hughes Fowler Carruthers and Fellow and President – European Chapter, IAML

3.50pm – 4.20pm

**Refreshment Break**

4.20pm – 4.40pm

**Trusts, the family business and divorce**

Michael Gouriet, Partner – Family Law Group, Withers LLP and Fellow, IAML

4.40pm – 5.00pm

**Family advisors and marital agreements – where are we now?**

William Massey, Partner and Head – Family Law, Farrer & Co and Fellow, IAML

5.00pm – 5.20pm

**Alternatives to court – divorce and the family business**

Maggie Rae, Co – Chair, Collaborative Family Law (CFL), Arbitrator, Collaborative Lawyer and Family/Commercial Mediator, Clintons and Fellow, IAML

5.20pm – 5.50pm

**Matrimonial aspects of wealth protection: what every business advisor should know**

**Panel discussion followed by questions & answers**

Chaired by: Chris Lintott TEP, Partner – Private Client, Penningtons Manches LLP and Chair, STEP Business Families SIG

5.50pm – 5.55pm

**Closing Remarks**

Chris Lintott TEP, Partner – Private Client, Penningtons Manches LLP and Chair, STEP Business Families SIG  
William Longrigg, Head – Family Sector, Charles Russell Speechlys LLP and President, IAML

5.55pm – 7.30pm

**Networking Drinks Reception**

#### Delegate Fee

Business Families SIG Member £80  
IAML Fellow £80  
STEP Members £95  
Non-members £115

Accredited for 3 hours  
STEP and SRA CPD

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# Registration Information

Register online today at [www.step.org/half-day-conferences](http://www.step.org/half-day-conferences)



## Annual General Meeting 2014 of the STEP Business Families Special Interest Group

Preceding their conference, the STEP Business Families Special Interest Group will also hold their annual general meeting which will be open for attendance by members of the special interest group, the group's steering committee, and any other interested persons. Discussion will focus on plans for the year ahead and will be an opportunity to input into the group's planned 2015 activities. If you plan on attending, simply indicate this when registering for the conference.



## ABOUT STEP

STEP is the worldwide professional association for practitioners dealing with family inheritance and succession planning. The Society helps to improve public understanding of the issues families face in this area and promotes education and high professional standards among its members.



## ABOUT IAML

IAML is a worldwide association of practising lawyers who are recognised by their peers as the most experienced and skilled family law specialists in their respective countries.

## Payment

EVENT CODE: 5382

### Delegate Rates

Business Families SIG Member £80  
IAML Fellow £80  
STEP Members: £95  
Non-members: £115

PLEASE REGISTER ONLINE AT [WWW.STEP.ORG/HALF-DAY-CONFERENCES](http://WWW.STEP.ORG/HALF-DAY-CONFERENCES)

YOU WILL BE ABLE TO SELECT FROM THE FOLLOWING PAYMENT OPTIONS UPON REGISTERING:

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Payment by credit card is by Visa & Mastercard only.

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SEND YOUR REMITTANCE ADVICE TO [ACCOUNTS@STEP.ORG](mailto:ACCOUNTS@STEP.ORG)

## Terms and Conditions

### Registration Fee

The event registration fee includes participation in the conference, refreshments and documentation material. All bookings are considered binding on completion of the registration form.

### Cancellations

Cancellations must be received in writing at least seven days before the date of the conference and will be subject to an administration charge of £30.00. It is regretted that cancellations made after this time will not be accepted and the delegate will be liable for the full event fee. Substitutions may be made at any time provided the organisers are notified prior to the conference.

**Please note that if a non-STEP member attends in lieu of a STEP Member, or a non-member or STEP Member attends in lieu of a STEP SIG Member or an IAML Fellow, then the difference in fees will be charged.**

### Event Documentation

Please note that in order to reduce the environmental impact of the event, event documentation may be provided electronically, rather than in printed copy. If this is the case, registrants will be provided with the details to access this.

If you are unable to attend the event and would like to purchase an electronic copy of the event documentation, you can do so by emailing [orders@step.org](mailto:orders@step.org). A charge of £25.00 will apply. Electronic copy is sent after payment has been received. Event documentation contains notes from those speakers who provide them.

### Accreditation

The event is accredited for 3 hours structured training under the CPD/CPE schemes as follows, subject to the appropriate claim being made by the delegate: Society of Trust and Estate Practitioners (STEP), The Solicitors Regulation Authority (SRA)

### Disclaimer

It may be necessary for reasons beyond control of the event organisers to alter the content and timing of the programme or the identity of the speakers.

### Society of Trust and Estate Practitioners

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