



ADVISING FAMILIES ACROSS GENERATIONS

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invites you to a virtual meeting series

STEP VIRTUAL DISCUSSION GROUPS July-November 2020

on the last Thursday of each month 12-1pm

Discussion topics, speakers and dates

30th July: Capital Gains Tax Changes. Kenny Macdonald, Turcan Connell.

27th August: Succession Consultation and Legal Rights. Roddy Harrison, Dentons and James Aitken (in Association with Private Client Scotland Forum).

24th September: Tax planning opportunities now and potential changes ahead. Lisa MacPherson-Fletcher, Saffrey Champness.

29th October: LBTT/ADS and conveyancing for the executry and trust practitioner, Grant Johnston, WJM and Robbie Wishart, Wisharts Law.

26th November: Mediation in executry/trust matters, Charlie Irvine, Charlie Irvine Mediation

Q&A and discussion

Timings

Log on: 11.59am

STEP Scotland local discussion forum introduction
(Glasgow, Edinburgh, Aberdeen, Dundee, Perth, Inverness)

Discussion Forum from 12.05pm – 1.00pm
(please allow 30mins for additional discussion if it is required)



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Please email STEP.Scotland@step.org if you would like to attend the Virtual Discussion Groups and please state which session(s) you would like to attend.

A webinar link (Zoom) will be sent to you after you have registered. You will require an internet connected device to attend this session.

Places are limited so please apply promptly.

There will be no charge for this meeting.

Finally... your questions

The virtual discussion forum format will have introductions on each topic (20-30mins on average) followed by Q&A and discussion.

It would be helpful if you do intend to attend for you to provide a couple of questions in advance that you would like to hear discussed.

We will aim to incorporate your questions into the talks, or may open with them to get the discussion off to a good start. Thank you in anticipation.

Dates for your diary

As you will be aware, we have moved both of our Spring and Summer conferences back by one year. We will shortly update you on our Autumn conference which we host in association with the WS Society on **8th October**. The Autumn conference will be run virtually and will be shorter than usual, running from 9.30am/10am-12.30pm. We are currently finalising the speakers and programme.

Bonus Discussion Group in association with Tilney – September 2020 date tbc

Perth Discussion Group: “What private client practitioners should know about family law” Speaker: Ruth Croman, Macnabs – January 2021 (date/venue tbc)

STEP/WS Private Client Conference (Virtual event) – 8th October 2020

2021 Spring Conference (Glasgow, Radisson Hotel) - 25th March 2021

2021 Summer Conference (Dundee, RSS Discovery) - 24th June 2021