



A Teatime Seminar for Trustees

Friday 12th June 2009

at Alexander House Hotel

Trustees Duties & Responsibilities

Are you a prudent trustee?

Fulfilling the role of a trustee can be extremely rewarding but it can also be hard work at times. With the recent turbulence in the stock markets and plummeting interest rates a trustees' responsibility for sound financial management is even more significant to ensure they carry out their legal duties as required by the 'Trustee Act 2000'.

Increased litigation is leading to trustees needing to review their roles. Our Trustees Duties and Responsibilities seminar is a teatime event for trustees concerning the funding, legal requirements and wealth management of trusts delivered by four leading experts from Lucas Fettes & Partners, Quilter and Adams & Remers Solicitors.

The seminar covers the duties and responsibilities that a prudent trustee will need to satisfy, plus an explanation of their legal powers and how they are best put into practice.

Our speakers will demonstrate the benefits of putting an investment policy in place and how having a financial adviser can add value and provide protection to trustees, plus a demonstration of the benefits of using a discretionary fund manager to maximise value.

The seminar takes place on Friday 12th June, 3pm to 5.30pm at Alexander House, and includes a luxury Cream Tea, featuring scones, cream, jam, pastries, finger sandwiches, strawberries, tea, coffee, orange juice and Champagne.

While entry is free, we expect the event to be popular and therefore entry will be by prior registration only, with places available on a first-come, first served basis. To avoid disappointment, please register before 5th June 2009.

See registration details and speaker profiles overleaf.

Seminar Programme

3.00pm

Registration, tea and coffee

3.15pm

Introduction by David Fettes
Lucas Fettes & Partners

3.25pm

Jessica Partridge
Adams & Remers

3.35pm

Chris Walker
Adams & Remers

3.45pm

Sarah Maguire
Lucas Fettes & Partners

3.55pm

Torquil Bebb
Quilter

4.05pm

Questions with Chris Walker
Adams & Remers

4.15pm

Afternoon Cream Tea

5.30pm

Close



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& PARTNERS

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Adams & Remers
SOLICITORS

"A superb outfit"
Chambers UK 2009

How to Register for the Trustees Duties & Responsibilities Seminar

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For further details and to register, contact Brenda Green at Adams & Remers by email brenda.green@adams-remers.co.uk or by phone 01273 403384

Our Speakers



Christopher Walker

Partner & Head of Private Client Department
Adams & Remers

Chris qualified as a solicitor in 1983 and is a founder member of the Society of Trust and Estate Practitioners. After working in London he joined Adams & Remers in 1996. He became Head of the Private Client Department in 2003. He advises on wills, estate planning and trust creation, acts as a trustee for family trusts and advises on all aspects of the taxation and administration of trusts. He brings a wealth of both technical know-how and practical experience to bear on clients' affairs.



Jessica Partridge

Solicitor, Private Client Department
Adams & Remers

Jessica joined Adams & Remers in 2001. She is an associate member of the Society of Trust and Estate Practitioners, and regularly deals with trust creation, administration of trusts, powers of attorney, preparation of wills, estate planning, taxation, probate, Court of Protection work and advising elderly clients. Her interests in helping vulnerable people extend to her extra-curricular activities, where she assists adults with learning difficulties to get the best from adult education courses.



Sarah Maguire

Chartered Financial Planner
Business Development Director, Lucas Fettes

Sarah has over 15 years experience of working in professional practices and is qualified as a Chartered Financial Planner - one of only 1500 in the country. Sarah is accustomed to dealing with the complex financial affairs of significantly wealthy individuals and their families. Being well practised at advising owners of small to medium sized enterprises, entrepreneurs and senior directors, with multiple pension arrangements at the point of business sale. Sarah has appeared on BBC radio, and in 2005 was the runner-up in the 'Woman Financial Adviser of the Year' Awards.



Torquil Bebb

Investment Manager
Quilter

Torquil is an Investment Manager with Quilter, who are specialists in providing investment management solutions. He has been managing private client portfolios for almost 25 years and is a Fellow of The Securities and Investment Institute (FSI). Torquil joined Quilter in 2008 and has returned to his roots to look after private clients, and such related structures as trusts, pension funds and offshore bonds. Having worked in the UK and overseas, he brings a wealth of knowledge to looking after client portfolios.



LOCATION

Alexander House Hotel
East Street, Turners Hill,
West Sussex, RH10 4QD

Tel: 01342 714914

www.alexanderhotels.co.uk

Arriving by road

Leave the M23 motorway at junction 10 and follow the signs for East Grinstead. At the second roundabout follow the signs for Turners Hill (B2028). Once in Turners Hill Village, turn left at the crossroads (B2110) to East Grinstead Alexander House Hotel is on the left hand side after approximately 1.5 miles.

Arriving by rail

Nearest station - East Grinstead 4 miles. Mainline station - Gatwick 9 miles.



Alexander House

HOTEL & UTOPIA SPA