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# Monday, 7<sup>th</sup> October

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DAY 1 - DALES SUITE, HILTON EAST MIDLANDS AIRPORT

8:30-  
9:00 AM

**Seb Shakh, Sure Will Writer - Professional Will Suite**  
Software Demonstration

9:00-  
9:45 AM

**Registration**  
Dales Suite Foyer

9:45-  
10:30 AM

**Brian McMillan, The Society of Will Writers**  
SWW Introduction

10:30-  
11:30 AM

**Siobhan Rattigan, Lead Tutor for The College of Will Writing**  
Inheritance (Provision for Family and Dependents) Act 1975: An Overview

11:30-  
12:00 PM

**Refreshments**  
Dales Suite Foyer

12:00-  
1:00 PM

**Fay Collinson, Kings Chambers**  
Undue Influence, Financial Abuse and Coercion of a Testator

1:00-  
2:15 PM

**Lunch**  
The Pavillion

2:15-  
3:15 PM

**James Greenwood-Reeves, Tutor for The College of Will Writing**  
How to Ruin an Otherwise Perfectly Good Trust Without Even Trying

3:15-  
3:45 PM

**Refreshments**  
Dales Suite Foyer

3:45-  
4:45 PM

**Simon Douglas, Barrister**  
Mistakes in Wills and How to Correct Them

4:45-  
5:00 PM

**Brian McMillan, The Society of Will Writers**  
Conference Close

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# Monday, 7<sup>th</sup> October

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DAY 1 - DALES SUITE, HILTON EAST MIDLANDS AIRPORT

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7:00-  
11:00PM

**Private Bar - Optional**  
Open for conference attendees only

7:30-  
11:00PM

**Private Dinner - Optional**  
Black Tie event for conference attendees only

7:30-  
11:00PM

**Dinner Entertainment**  
Music from Paul Jackson and Table Illusionist, Bradley Duncan

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## Society Staff

If you require any assistance or if you have any questions during the conference then please ask a member of the Society team.

This year the whole team will be in attendance across both days including staff from The National Will Archive.

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### Society:

Brian McMillan  
Diane Mandeville  
Anthony Belcher  
Sam Smith

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Libby Robinson\*  
Sharon Norris  
Siobhan Rattigan  
Carolyn Turner

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### Storage:

Helen Gibson  
Lynn Smith  
Chris Thompson

\*Attending the dinner only

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**Please note:** Speakers are expressing their own views which may not necessarily be the views of The Society of Will Writers. Some speakers may refer to their own goods and services, whilst The Society does not object to this we do not endorse any particular firm or individual unless mentioned otherwise.

Recruitment activity of any kind at any time during the conference is **strictly forbidden**.

Please ensure that all **mobile phones are switched off** during the conference.



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# Tuesday, 8<sup>th</sup> October

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GROUP 1 - DERWENT SUITE

09:15-  
10:15AM

**Gerrard Fisher, Astrid Data Protection Ltd.**  
Protecting Your Clients' Personal Data - Practical Actions to Comply with Regulations

10:40-  
11:40AM

**Tim Farmer, TSF Mental Capacity Assessors**  
The Three Phases of Mental Capacity Assessments

11:45-  
12:45AM

**Andy Riddle, Professional Deputies**  
Deputyships - the Good, the Bad and the Ugly

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GROUP 2 - SUDBURY SUITE

09:15-  
10:15AM

**Andy Riddle, Professional Deputies**  
Deputyships - the Good, the Bad and the Ugly

10:40-  
11:40AM

**Gerrard Fisher, Astrid Data Protection Ltd.**  
Protecting Your Clients' Personal Data - Practical Actions to Comply with Regulations

11:45-  
12:45AM

**Tim Farmer, TSF Mental Capacity Assessors**  
The Three Phases of Mental Capacity Assessments

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GROUP 3 - RUTLAND SUITE

09:15-  
10:15AM

**Tim Farmer, TSF Mental Capacity Assessors**  
The Three Phases of Mental Capacity Assessments

10:40-  
11:40AM

**Andy Riddle, Professional Deputies**  
Deputyships - the Good, the Bad and the Ugly

11:45-  
12:45AM

**Gerrard Fisher, Astrid Data Protection Ltd.**  
Protecting Your Clients' Personal Data - Practical Actions to Comply with Regulations

Lunch will be served in The Pavillion following the workshops

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# Booking Form

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## Delegate Details

Company Name: .....

Delegate Names: .....

Address: .....

Phone: .....

Email: .....

Dietary Requirements: .....

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## Attendees

Prices shown in brackets are for non-SWW Members

Conference - **both days**, including lunch and refreshments      £185 (£250)      Qty: .....

For 2019 only the conference booking includes both days at special discounted rate to mark the Society's 25<sup>th</sup> anniversary.

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## Accommodation Options

**Sunday 6th October** - £90 Qty: .....

Bed & Breakfast

**Dual Occupancy\*** - +£10 Qty: .....

**Monday 7th October** - £140 Qty: .....

Dinner, Bed & Breakfast

**Dual Occupancy\*** - +£60 Qty: .....

**Sunday 6th & Monday 7th October** - £230 Qty: .....

6th Bed & Breakfast/7th Dinner, Bed & Breakfast

**Dual Occupancy\*** - +£70 Qty: .....

**Room Type** - Double  Twin

\*Dual occupancy payment is in addition to the standard room cost

**Private Dinner Only** - Dinner & entertainment on the 7th October - £50 Qty: .....

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# Terms & Conditions

## General

This conference is organised by The Society of Will Writers and Estate Planning Practitioners (SWW) registered in England and Wales - Company Number: 02918900.

Any reference to 'us', 'we' or 'our' shall mean the SWW.

Any reference to 'you' or 'your' shall mean the delegate.

## Bookings

A booking will be confirmed on receipt of a satisfactory booking form (via post, email or online). Where details are missing or unclear we will email you for further information. A booking is not confirmed until payment has been received. Upon receipt of your conference booking, you will be emailed with location information and a confirmation.

The SWW reserves the right to reject any booking without having to give a reason.

Space at conference is subject to availability.

A booking includes both day 1 and day 2 for the price stated on the booking form. No substitutes or discounts will be available if only attending one of the days.

## Tickets

Tickets will be emailed to you no less than 4 weeks before the event (unless your booking is received during this period).

You must bring your ticket with you (printed or electronically) in order to be admitted into the event. If you cannot produce a valid ticket we reserve the right to refuse you entry.

## Advertising

Advertising at the event is strictly prohibited unless you have sought and received permission from the SWW.

## Content

All rights in all presentations, documentation and materials published or otherwise made available as part of the conference (including but not limited to any documentation packs or audio or audio-visual recording of the conference) ("Content") are owned by us or are included with the permission of the owner of the rights. No (i) photography, filming or recording; or (ii) republication, broadcast or other dissemination of the Content is permitted. You shall not distribute, reproduce, modify, store, transfer or in any other way use any of the Content (save that use by the relevant delegate for internal business purposes shall be permitted), and in particular (but without limitation) you shall not (and shall procure that each of your delegates shall not):

- upload any Content into any shared system;
- include any Content in a database;
- include any Content in a website or on any intranet;
- transmit, re-circulate or otherwise make available any Content to anyone else;
- make any commercial use of the Content whatsoever; or
- use Content in any way that might infringe third party rights or that may bring us or any of our affiliates into dispute.

The Content does not necessarily reflect our views or opinions.

Suggestions or advice contained in the Content should not be relied upon in place of professional or other advice. Whilst we take reasonable care to ensure that the Content created by us is accurate and complete, some of it is supplied by third parties and we are unable to check its accuracy or completeness. You should verify the accuracy of any information (whether supplied by us or third parties) before relying on it. The Content is provided on an "AS IS" basis without any warranties of any kind (express or implied). We hereby exclude to the fullest extent permitted by law all liabilities, costs, claims, damages, losses and/or expenses arising from any inaccuracy or omission in the Content or arising from any infringing, defamatory or otherwise unlawful material in the Content.

To the extent that any Content is made available by us online we reserve the right to suspend or remove access to such Content at any time.

## Payments

Your spot at conference will be confirmed once payment has been received. You may make payment by BACS into our 'conference account', by cheque, or by card over the telephone. No card information will be retained after the payment has been made.

## Cancellations

Should you wish to cancel your conference booking, please notify the SWW in writing by emailing [diane@willwriters.com](mailto:diane@willwriters.com) or writing to Diane Mandeville, Chancery House, Whisby Way, Lincoln, LN6 3LQ. Once we have received your cancellation we will confirm receipt within 3 working days.

If you cancel a bedroom booking more than 4 weeks before the conference, no costs will be incurred. Bedrooms cancelled within 4 weeks of the conference will be charged at the full rate.

If conference bookings are cancelled before 16:00 on the 9th September then a full refund minus administration fee of £25 will be given. Bookings cancelled after this date including non-attendance will be due no refund.

## Liability

The Society of Will Writers accept no liability for the advice or information given by presenters or exhibitors at the SWW conference.

## Privacy Statement

For information about how we hold and use your data please see our [privacy statement](#).

The SWW reserve the right to amend these terms and conditions where necessary. Attendees will be notified in writing.