
Monday, 11th October

DAY 1 - DALES SUITE, HILTON EAST MIDLANDS AIRPORT

8:30-
9:00 AM

Steve Blofield founder of Redwood Wills and Trusts & Regional Chair for SWW

An estate plan report that will provide your clients with greater understanding of:

· The Benefits of your advice! · Value for money! · Increase your profitability! · Increase Referrals!

9:00-
9:45 AM

Registration

Dales Suite Foyer

9:45-
10:15 AM

Anthony Belcher, The Society of Will Writers

SWW Introduction & Update

10:15-
10:30 AM

Antony Brinkman, Chairman of the SWW Professional Standards Board

SWW PSB 2021 Update

10:30-
11:30 AM

Antony Brinkman, Chairman of the SWW Professional Standards Board

Topic TBC

11:30-
12:00 PM

Refreshments

Dales Suite Foyer

12:00-
1:00 PM

Matthew Hill, Chief Executive of The Legal Services Board

Reshaping legal services: A sector-wide strategy

1:00-
2:15 PM

Lunch

The Pavillion

2:15-
3:15 PM

Siobhan Smith, Lead Tutor for The College of Will Writing

Changes to the Trust Registration Service following MLD5: What you need to know to be prepared

3:15-
3:45 PM

Refreshments

Dales Suite Foyer

3:45-
4:45 PM

Jacob Meagher, Lecturer at the University of Brighton

Topic TBC

4:45-
5:00 PM

Anthony Belcher, The Society of Will Writers

Conference Close

Monday, 11th October

DAY 1 - DALES SUITE, HILTON EAST MIDLANDS AIRPORT

7:00-
11:00PM

Private Bar - Optional

Open for conference attendees only

7:30-
11:00PM

Private Dinner - Optional

Open for bookings by conference attendees only

7:30-
11:00PM

Dinner Entertainment

TBC

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.

Society:

Anthony Belcher
Diane Mandeville
Sam Smith
Libby Robinson

⋮

Sharon Norris
Siobhan Smith
Manisha Chauhan
Monika Valauskiene

⋮

Storage:

Helen Gibson
Lynn Smith
Chris Thompson

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, and whilst the Society does not object to this, we do not endorse any particular firm or individual unless mentioned otherwise.

A range of exhibitors, some of which will be partners of the Society will be present throughout the foyer for the duration of the conference.

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.

Tuesday, 12th October

GROUP 1 - DERWENT SUITE

09:15-
10:15AM

Paula Finch, NBM Business Growth

Fans, Wills and Success

- Taking you on a short journey of how by adopting the same principles of the most successful sporting clubs around the world you can have the success you desire by creating your very own fanclub.

10:40-
11:40AM

Adam Johnson, Heritage Will Writing

Pensions and Death – taxing questions answered

- Looking at the tax treatment of Money Purchase and Defined Benefit Pensions for clients on death.
- The advantages (and challenges) of pension spousal bypass trusts.
- Planning points for the estate planner to consider.

11:45-
12:45AM

Seb Shakh, WillSuite

Technology Impact on the Future of Will Writing

GROUP 2 - SUDBURY SUITE

09:15-
10:15AM

Seb Shakh, WillSuite

Technology Impact on the Future of Will Writing

10:40-
11:40AM

Paula Finch, NBM Business Growth

Fans, Wills and Success

11:45-
12:45AM

Adam Johnson, Heritage Will Writing

Pensions and Death – taxing questions answered

GROUP 3 - RUTLAND SUITE

09:15-
10:15AM

Adam Johnson, Heritage Will Writing

Pensions and Death – taxing questions answered

10:40-
11:40AM

Seb Shakh, WillSuite

Technology Impact on the Future of Will Writing

11:45-
12:45AM

Paula Finch, NBM Business Growth

Fans, Wills and Success

The speakers will rotate around the groups, please remain seated in your assigned group.

Lunch will be served in The Pavillion following the workshops.

Booking Form

Delegate Details

If booking for multiple people, please include all names, contact details required for main booking contact only

Delegate Name(s):

Address:

Phone:

Email:

Dietary Requirements:

Conference Options

Prices shown in brackets are for non-SWW Members

Conference - **day 1 only** - £185 (£250) - Qty:

Conference - **day 2 only** - £75 (£110) - Qty:

Conference - **both days** - £225 (£300) - Qty:

Conference tickets are inclusive of refreshments and lunches. If you have any dietary requirements, please ensure you notify us using the space on this form above.

Accommodation Options

Sunday 10th October - £90 - Qty:

Bed & Breakfast

Dual Occupancy* - +£10 - Qty:

Monday 11th October - £140 - Qty:

Dinner, Bed & Breakfast

Dual Occupancy* - +£60 - Qty:

Sunday 10th & Monday 11th October - £230 - Qty:

10th Bed & Breakfast & 11th Dinner, Bed & Breakfast

Dual Occupancy* - +£70 - Qty:

Double Room Twin Room

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

Private Dinner Only - Dinner & entertainment on the 11th October - £50 Qty:

Please return your booking form to diane@willwriters.com

Terms & Conditions

General

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

Any reference to 'us', 'we' or 'our' shall mean The Society of Will Writers and Estate Planning Practitioners.

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

Bookings

A booking will be confirmed by us 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. Upon receipt of your conference booking, you will be emailed with location information and payment details.

A booking includes your conference and any accommodation options for the price stated on the booking form. No substitutes or discounts will be available unless otherwise stated.

Spaces at conference are subject to availability.

We reserve the right to reject any booking without having to give a reason.

Tickets

Tickets will be emailed to you no later than 17:00 on the 13th September 2021 providing payment has been received by us. For bookings received after this date, tickets will be sent within 3 working days following receipt of payment.

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 & Recruitment

Advertising and/or recruitment at the event is strictly prohibited unless you have sought and received permission from us.

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 disrepute.

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 place at conference will be confirmed once payment has been received. You will be sent an invoice for your booking and may make payment by BACS into our conference account or by paying online or over the telephone by card. No card information will be retained after the payment has been made.

Your payment must be received by us no later than 16:00 on the 10th September 2021. If your booking is received after this date payment will be required from you at the time of booking.

We reserve the right to refuse your entry to the event for any late or non-payments.

Cancellations

Should you wish to cancel your booking, please notify us in writing by sending your cancellation to Diane Mandeville, either by email to diane@willwriters.com, or by post to Chancery House, Whisby Way, Lincoln, LN6 3LQ. Once we have received your cancellation we will confirm receipt within 3 working days.

If your booking is cancelled before 16:00 on the 10th September 2021 then a full refund minus an administration fee of £25 will be given. Bookings cancelled after this date including non-attendance will be due no refund.

Liability

We accept no liability for the advice or information given by speakers, exhibitors or other 3rd parties at the conference.

Privacy Statement

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

We reserve the right to amend these terms and conditions where necessary. Delegates will be notified in writing.