
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, Director of 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

Professional Services: Knowledge vs. Skills

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

When Wills go Wrong: The Aftermath of Drafting

4:45-
5:00 PM

Anthony Belcher, Director of 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

Bradley Duncan – Table Illusionist, Chris Taylor – Caricaturist (from 9:00 – 11:00) and Casino Tables

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.

Members of the Society team will be in attendance across both days including staff from The National Will Archive.

Society:

Anthony Belcher
Diane Mandeville
Libby Robinson
Monika Valauskiene

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Ruby Nott
Sam Smith
Sharon Norris
Siobhan Smith

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⋮
⋮

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.
