



DIXCART

Dixcart Seminar:

The Future of International Succession Planning

Thursday 28 March 2019 at 16.15

Great Hall, Chartered Accountant's Hall, One Moorgate Place, London, EC2R 6EA

**The seminar will be followed by a networking reception and
refreshments until 20.00**

The Dixcart Group provides commercial and professional services to international organisations, families and individuals. Our international business services are designed to assist companies and individuals to manage their affairs, trade efficiently and use tax efficient structures. We work with professional intermediaries to complement and extend the services they offer to their clients. Dixcart is an independent organisation with offices in Cyprus, Guernsey, Isle of Man, Malta, Nevis, Portugal (Lisbon and Madeira), South Africa, Switzerland and the UK.

Seminar Subjects

The Future of Trusts

John Barnett – Partner, Burges Salmon, London

Family Investment Companies

Deborah Clark – Partner, Mills & Reeve LLP, Manchester

Using Guernsey and the Isle of Man For International Succession Planning

Siân Staples – Associate Director, Dixcart Trust Corporation Limited, Guernsey

www.dixcart.com

Solicitors and Accountants may claim one unaccredited CPD hour.

Subjects presentation must be of a relevance/benefit to your area of work. Our seminars are not certified by the Solicitors Regulation Authority (SRA), the Institute of Chartered Accountants in England and Wales (ICAEW) or any other professional body.

Email: bridget.carman@dixcart.com

The Impact of Global Mobility on International Succession Planning

Thursday 28 March 2019 at 16:15

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Followed by a Reception and Refreshments.

Chairman: Simon Kelly

Simon is a member of the Association of Chartered Certified Accountants and has over 25 years' extensive managerial experience working with international clients. His specific areas of expertise is with private clients, private equity funds, asset protection structuring, and succession planning for families.

Simon has been with the Dixcart Group for over 23 years and his experience and entrepreneurial approach is highly valued by his clients and advisors. Simon was appointed Managing Director of Dixcart Management (IOM) Limited in 1997, and he has overseen the extensive growth of this office both in terms of members of staff and profitability.

John Barnett

John has worked at Burges Salmon for over 20 years and is head of the firm's private client services department. He provides tax advice to a wide-range of high-net worth individuals and many leading banks and other financial institutions. He has a particular focus on entrepreneurial clients, many of whom are not domiciled in the UK or have business or other interests abroad.

John chaired the CIOT's Capital Gains Tax sub-committee from 2006 to 2014 and since then has been a member of the CIOT's governing Council. He was a member of the General Anti-Abuse Rule (GAAR) panel that approved HMRC's initial GAAR guidance. He has led the CIOT's response on a large number of capital tax policy discussions with HMRC and HM Treasury since 2006 including, in particular, the domicile changes since 2008 and the statutory residence test.

Deborah Clark

Deborah Clark is a barrister and partner at law firm, Mills & Reeve LLP. Deborah specialises in estate planning for private clients, advising on all aspects of inheritance tax, capital gains tax, trusts, wills and LPAs. She has a particular interest in business succession planning and dealing with difficult probate matters. Deborah has a national reputation for her work on using family investment companies in estate planning and she is a regular speaker on the topic.

Deborah is also a Chartered Tax Advisor and member of STEP.

Siân Staples

Siân joined Dixcart Trust Corporation Limited in July 2018 as an Associate Director and Head of Business Development for the Dixcart office in Guernsey. With over 15 years of experience working in the Guernsey Trust and Corporate sector, she has gained valuable expertise in administering and managing complex structures for UHNWI's and families. Asset classes Siân has been involved in, include real estate, private equity holdings and alternative asset classes. She also has extensive experience in taking private equity projects to list on London AIM.

Siân has been a full member of STEP since qualifying in 2009 and is currently undertaking the Institute of Directors Diploma qualification.

Other Dixcart Professionals who will be at the seminar include **Robert Homem** (Dixcart Cyprus), **Bruce Watterson**, **John Nelson** and **Steven de Jersey** (Dixcart Guernsey), **Simon Kelly** (Dixcart Isle of Man), **Jonathan Vassallo** and **Henno Kotze** (Dixcart Malta), **Graham Sutcliffe** (Dixcart Nevis), **Sean Dowden** and **Carlos Santos** (Dixcart Portugal), and **Christine Breitler** (Dixcart Switzerland). You will also be able to meet Dixcart Business Development Managers: **David Burge** and **Naveen Ayyaril**.

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