

Managing the fallout from the budget

Briefing Seminar for
Chartered Accountants



13 July 2009

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Truestone - Investment and financial planning specialists

Truestone was established in 1987, and has since built an enviable reputation as an adviser to senior executives and professionals in and around London. Many of our clients are business owners. As a result we have developed expertise in maximising the opportunities that result from the inevitable overlap between their business and personal financial affairs. We do not mass produce financial advice. We work with each client's accountants and legal advisers to produce a bespoke financial strategy.

The fallout from the recent budget will test all professionals advising wealthy individuals and business owners. As a result, Truestone is running this free seminar to provide Chartered Accountants with practical solutions for their clients.

Agenda - 13 July

Speakers

8.30am Coffee, croissant and registration

9.00am **Session 1 - Pension Contributions & Salary Sacrifice** Speaker, Angus Branfield

A demonstration of how you can help businesses save money on their pension arrangements and at the same time deliver significant increases in the value of pension contributions for employees through the implementation of salary sacrifice.

Angus Branfield – Head of Private Clients

Angus has worked in Financial Services for 24 years, and has been actively advising clients since 1992.

Angus has a degree in Financial Services, is a Fellow of the Personal Finance Society and is a Chartered Financial Planner making him among the best qualified advisers in the country.

As Head of Private Clients at Truestone he is experienced in dealing with highly complex issues on behalf of clients.

9.30am **Session 2 - Turning Income into Gains** Speaker, Lyndon Heppollette

With the top rate of **Income Tax** rising for higher earners, it is increasingly important to know how to make the most of the **Capital Gains Tax** allowance. We will demonstrate how the different tax regimes will impact your clients' investment returns and which investments you can use for maximum tax efficiency.

Lyndon Heppollette – Head of Technical Consulting

Lyndon has been Head of Technical Consulting at Truestone for two years. After graduating with an honours degree in Financial Economics, he started his career in Financial Services in 1996. Having spent his formative years advising clients directly on planning issues, he now runs the technical team and is a member of our Investment Management Committee.

As Head of Technical Consulting it is Lyndon's responsibility to combine tax planning with the investment management service that we provide.

10.00am **Session 3 - Investment Choices** Speaker, Nick Morgan

How do you balance the tax efficiencies of **Enterprise Investment Schemes (EIS)** and **Venture Capital Trusts (VCT)** against the relatively high risk labels they carry? We will help you to identify when these investments might be appropriate.

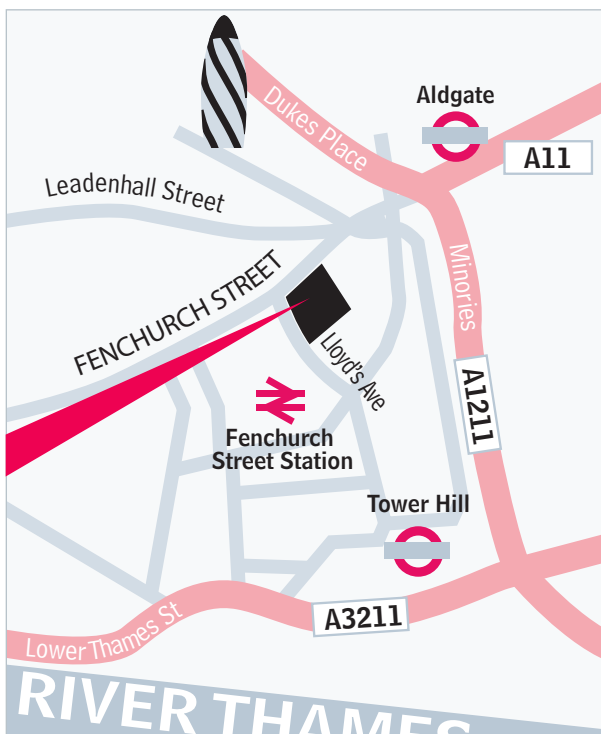
Nick Morgan – Relationship Manager, Octopus

Octopus Investments is a market-leading company in the VCT and EIS product space, offering a wide range of innovative solutions to suit investors with different needs. Octopus has been voted VCT Provider of the Year for the last three years by Professional Adviser Magazine.

10.30am **Finish** - Refreshments

Venue

Truestone Asset Management, Dixon House
(Lloyd's Avenue entrance), 72-75 Fenchurch
Street, London EC3M 4BR.



To book your place

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