



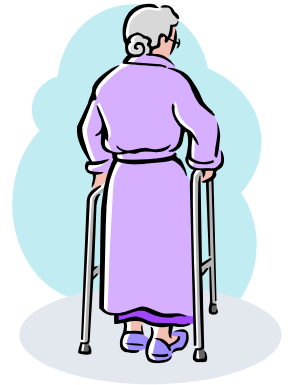
**INSTITUTE OF PROFESSIONAL WILLWRITERS  
PRESENTS**

**ADVISING THE ELDERLY**

**A ONE DAY COURSE TO CONFIRM KNOWLEDGE AND INTRODUCE DELEGATES  
TO ADVISING THE ELDERLY  
(SOME EXPERIENCE IN WRITING WILLS IS REQUIRED)**

**WEDNESDAY 18 JUNE 2008**

- ❖ The market for elderly clients
- ❖ Issues affecting elderly clients
- ❖ Capacity
- ❖ Care fees – the rules
- ❖ Mitigating Care Fees – through writing a Will
  - Protecting the house
  - Protecting cash and savings
- ❖ Pre paid funeral plans
- ❖ Drafting tips
- ❖ Worked examples including sample Wills
- ❖ Covering your back!!



**REGENT HALL**

**275 OXFORD STREET, LONDON W1C 2DJ**

**Registration & Coffee at 9.00 am**

**Close 4.30pm**

**CPD 5.5 HRS**

**Price: £175 inclusive of Notes for Full/Student/Associate Members**

**£195 inclusive of Notes for Non-Members**

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**Numbers are strictly limited**

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All bookings, with cheque payable to IPW to: **IPW, Trinity Point, New Road, Halesowen, B63 3HY**  
or book with a credit/debit card by telephoning 08456 442042. **Please book your place by 4 June 2008**

Please reserve \_\_\_ place(s) @ £175/£195 on the Advising the Elderly Course on **Wednesday 18 June 2008**

Name..... Company.....

Address .....

.....Postcode:..... Tel ..... Email:.....

Special Dietary Requirements.....

**IPW Cancellation Policy:** For bookings cancelled more than 14 days before the event, a full refund less £25.00 administration fee will be given. No refunds will otherwise be made.



**Aims:** A one-day course to confirm knowledge and introduce delegates to Advising the Elderly

**Prerequisites:** some experience in writing Wills is required

**Outcomes:** By the end of the course, with the aid of their course notes delegates will be able to:

1. understand and appreciate the market
2. understand and appreciate the Issues affecting elderly clients
3. be able to access capacity using Banks v Goodfellow
4. take instructions from elderly clients avoiding a future “Lark v Nugus letter”
5. complete land registry forms for a mutual severance of joint tenancy and a unilateral severance of joint tenancy
6. understand care fee mitigation and be able to advise clients of various options
7. draft Wills to include life interest or rights to residue
8. be able to choose an appropriate testamonium and attestation clauses
9. be able to explain to clients how the trusts (in 7 above) in their Wills are taxed after their death.
10. discuss pre-paid funeral plans