



Willwriting Academy Limited

Trinity Point -New Road – Halesowen – B63 3HY

Telephone: 08456 444261 Email: courses@willwriting-academy.org.uk

Company limited by guarantee.

Company Registration: 6795501

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 10 MARCH 2010

- ❖ 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!!



NETTLE HILL TRAINING & CONFERENCE CENTRE ANSTY, COVENTRY CV7 9JL

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

Numbers are strictly limited

Please take along your copy of Parker's Modern Wills Precedents

All bookings, with cheque payable to 'Willwriting Academy Ltd' to:

**Willwriting Academy Ltd, Trinity Point, New Road, Halesowen, B63 3HY or call 08456 4422042 to pay
with your credit/debit card.**

Alternatively, book on line by registering at www.willwriting-academy.org.uk and booking the course in
the section 'Attendance based courses for Willwriters'. Please book your place by 1 March 2010

Please reserve ___ place(s) @ £175/£195 on the Advising the Elderly Course on **Wednesday 10 March 2009**

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

Address

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

Special Dietary Requirements.....

Willwriting Academy Ltd 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