WEALTH PRESERVATION SEMINAR - AGENDA

Wednesday 24th October 2018
10.00am-1.00pm
Huntingdon Racecourse, Brampton, PE28 4NL

10.00am	**Arrival and Registration**
	Refreshments will be available
10.25am	**Welcome and Introduction**
	Philip Peters, Tax Partner & Chairman, Whiting & Partners
10.30am	**Tax planning Tips**
	Barbara Nicholas, Tax Partner, Whiting & Partners
11.00am	**Passing on Wealth – How hard can it be?**
	Brian Radbone, Head of Technical Services, Transact
11.30am	**Refreshment break**
11.45am	**Investment Markets and the impact of Brexit**
	Alexis Gray, Senior Economist, Vanguard Investment Strategy Group
12.30pm	**Introduction to Whiting & Partners Probate Services**
	Philip Peters, Tax Partner & Chairman, Whiting & Partners
12.45pm	**Whiting & Partners Wealth Management – Summary & Close**
	Richard Franks, Senior Financial Planner, Whiting & Partners Wealth Management
1.00pm	**Lunch**
2.00pm	**Event close**

Speaker bios

Philip Peters, Tax Partner & Chairman, Whiting & Partners

Philip qualified with an Essex based practice in 1985, achieving the highest marks in the professional examinations amongst candidates from East Anglia. He has specialised in personal and corporation taxation matters since 1988, when he moved to the Bury St Edmunds office of a national firm and became a member of the Chartered Institute of Taxation. He joined Whiting & Partners in 1997 and continues to advise a wide range of clients on their taxation affairs, from our Bury St. Edmunds office, where he is a resident partner and now also Chairman of the firm.

Barbara Nicholas, Tax Partner, Whiting & Partners

Barbara joined the firm as a tax specialist in 1990. She began her career with the Inland Revenue, before 'crossing the fence' to work for a London firm and then a 'Big 4' firm in Cambridge. She is an associate of the Chartered Institute of Taxation and a member of the Association of Taxation Technicians. As such, she deals solely with personal tax related compliance and planning issues. Based in our Ely office, Barbara is the partner that heads up our private client tax and payroll bureau departments. Her expertise is in demand throughout the firm and she makes regular trips to all offices.

Brian Radbone, Head of Technical Services, Transact

Brian has been in the financial services industry for 35 years. He started with Clerical Medical in Reading in 1983 moving onto the Cambridge office after 5 years. He joined employee benefits adviser firm R K Harrison in 1992 to gain a broad experience of the financial adviser side of the business. He then joined Transact in December 1999 shortly before its launch. Here he provided input into the development the tax wrapper functionality on the system whilst establishing a technical tax support function for financial advisers. He is now responsible for a team of thirteen providing support to both advisers and the business.

Alexis Gray, Senior Economist, Vanguard Investment Strategy Group

In this role, she contributes to the development of Vanguard's investment methodology, and provides analysis on global macroeconomics and fixed income strategy. She has authored numerous research papers, primarily focusing on portfolio strategy and economics. Alexis also regularly serves as an ambassador for Vanguard, speaking at client events and industry conferences on a range of topics.

Prior to joining Vanguard in 2012, Alexis was a quantitative analyst in global markets at the Australia & New Zealand Banking Group, and worked as a full-time research assistant in the Department of Economics at the University of Melbourne.

Alexis earned a bachelor's degree in economics and finance with first class honours from the University of Melbourne and a Master of Statistics from the London School of Economics.

Richard Franks, Senior Financial Planner, Whiting & Partners Wealth Management

Richard has been working in financial services since 1999. He started with Refuge Assurance within the Home Service industry learning his trade. His background over the last 15 years has been within the Corporate and Private Bank setting dealing with High Net Worth Clients in a range of bespoke solutions. Richard now covers our Ely, St Ives and St Neots offices and the Cambridge Corridor. Richard enjoys dealing face to face with clients and growing strong relationships with them over many years and sees the importance of what effective planning can have for his clients.