



LONGMARK
TAX CONFERENCES LTD

Wednesday 24th June 2026

The Northern Practical Tax Planning Conference

for wealthy individuals and SMEs

VENUE: Delta Hotels Worsley Park Country Club – very close to Junction 13 M60

CONFERENCE SPEAKERS

Chair and Speaker:

Pete Miller, Jerroms Miller

Speakers:

- Nick Wright, Jerroms Miller
- Gary Ashford, Harbottle & Lewis
- David Pett, Temple Tax Chambers
- Becky Bonner, Trigpoint Financial Planning
- Matt Stringer, Grant Thornton
- Katherine Bullock, St. Katharine's Chambers

Conference Topics:

- Reorganisation anti-avoidance: the brave new world
- Crypto – the key tax issues and latest developments
- EOTs, share options, JSOPs and SIPs an update
- Pensions and IHT planning after April 2027 – all change
- Current international tax developments – 2026
- The critical private client update

**4 Delegates for the
Price of 3**

Programme: Wednesday 24th June 2026

8.45 REGISTRATION

9.30 Chair's opening address
PETE MILLER

9.40 Reorganisation anti-avoidance: the brave new world

- What's old: where we were and why the rules changed
- What's new: what the new rules do
- What's positive: why the new rules make more sense
- What's blue: practical issues

PETE MILLER & NICK WRIGHT

10.40 COFFEE

11.00 Crypto – the key tax issues and latest developments

- General background to crypto assets / tax issues around coins and tokens
- Law Commission work on property and conflicts of law (Lex situs)
- Issues linked to non dom and FIG regime
- Update on HMRC tax views issues around decentralised finance and non-fungible tokens (NFTs)
- International exchange of information around crypto (the CARF)
- Tax Investigations

GARY ASHFORD

12.00 EOTs, share options, JSOPs and SIPs an update

- What are ERS? – the fallout from the Vermilion decision
 - “founder's shares”
 - are “additional shares” ERS?
- Call for Evidence on tax support for entrepreneurs
- EOTs/EBTs:
 - the 2024 and 2025 changes to EOT rules
 - securing the interests of the vendors
 - issues on sales of an EOT-owned company
 - *Adams v FSC* – creditors vs beneficiaries
- EMI and CSOP share options
 - issues arising on due diligence
 - the independence requirement
 - early exercise and sales for cash
- SIPs & SAYE
 - responses to the 2023 call for evidence
 - why are they not more widely adopted?
- The continuing attraction of JSOPs over “growth shares”

DAVID PETT

13.00 LUNCH

14.00 Pensions and IHT planning after April 2027 – all change

- Losing the residence nil rate band: what its removal means and how to adapt estate plans accordingly
- Annuities revisited: why annuities may regain relevance and how they could fit into post-2027 retirement strategies
- Income & lifetime gifts: structuring withdrawals and gifts to reduce IHT exposure while supporting family goals
- Discretionary trusts & the frozen nil rate band: using trusts to manage rising estate values amid threshold freezes
- Life insurance: how insurance can provide an affordable medium term solution alongside a gifting strategy

BECKY BONNER

15.00 COFFEE

15.20 Current international tax developments – 2026

- Overseas expansion – key tax topics
- The UK transfer pricing climate
- Permanent establishment – remote & hybrid working

MATT STRINGER

16.20 The critical private client update

- BPR, APR and the transferable allowance
- Main residence relief developments
- The ownership period and new builds
- Co-ownership complexity: let properties and second homes
- Property protection trusts
- Alphabet shares for private clients: the 5 anti-avoidance codes to watch
- Fragmenting investment companies

KATHERINE BULLOCK

17.20 Chair's closing remarks and final questions
PETE MILLER

17.30 CONFERENCE CLOSE

Pricing

For payments received by **Saturday 9th May 2026:**

£575 + VAT per delegate

£1,725 + VAT (4 for the price of 3)

For payments received after **Saturday 9th May 2026:**

£625 + VAT per delegate

£1,875 + VAT (4 for the price of 3)

**CLICK HERE
TO REGISTER**

Administration

VENUE

Delta Hotels Worsley Park Country Club, Worsley, Manchester M28 2QT

FEE

Your fee includes attendance, refreshments, lunch and paper documentation. It is a condition of the booking that the fee is payable in advance. Once payment has been received a VAT receipt will be sent. Payment must include VAT.

OUR CONFIRMATION OF YOUR BOOKING

All online bookings will be acknowledged automatically by email and joining instructions (final conference details and a venue location map) will be sent out to delegates approximately two weeks before the event.

Please telephone immediately:

- if you have not received email acknowledgement within 24 hours of making your booking.
- if you have not received your joining instructions five days before the event.

SPECIAL NEEDS

If you have any special needs or particular dietary requirements, we are happy to help where possible. Please contact us on the enquiry numbers below with details.

CERTIFICATE OF ATTENDANCE / CPD INFORMATION

A certificate of attendance is available on request, following your attendance at this conference, as a record of your training and development. This conference carries 6 CPD hours.

CANCELLATIONS

A refund of fees will be made only for cancellations received in writing at least 21 days before the event (less a 25% cancellation fee to cover administration costs). No refunds will be made for cancellations received within 21 days of the event and failure to attend after confirming a booking will be subject to the same terms. A substitute delegate will be accepted at any time before the event.

DOCUMENTATION SALE

If you are unable to attend the conference but would like to purchase a set of the conference documentation (price £250 - zero VAT) please call us on **0845 260 1057** or e-mail info@longmark.co.uk. Your notes will be dispatched within 5 working days after the event.

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What recent delegates have said about our conferences...

“Wonderful speakers & highly relevant for me and my clients. Look forward to the next one.”

Adam Goosey, MHA

“Very informative and covered very relevant technical topics.”

Senior Manager, National Firm

“Excellent speakers as always – really good presentations which kept me engaged.”

Leonora Stevens, Safferys

For more information on this and forthcoming events log on to www.longmark.co.uk

Who are we?

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