

Tax. Pensions. Economy

Breakfast briefing triple-header

Where: The Buckinghamshire Golf Club

When Wednesday, May 18th

Breakfast served 7.45-8.20am

Briefings run from 8.30-9.35am

Briefing 1: Tax. Where Are We Now?

In our keynote presentation, Cormac Marum of Harwood Hutton will walk you through important changes to the UK tax environment and the strategies available to you and your businesses.

Briefing 2: Pension Changes and Directors' Remuneration

David Allan of 2hWealthcare outlines the changes to pension rules and explains why business owners need to reappraise their remuneration strategy.

Briefing 3: The Business Cycle. Understanding the Signals

Steve Wilson of 2hWealthcare analyses the macro forces that are shaping the business environment and offers some ideas on how to protect your assets.



Cormac Marum



David Allan



Steve Wilson

Briefing 1 Outline

Cormac Marum is the tax expert trusted by the *London Evening Standard* to deliver instant reaction in the wake of the Budget. *Standard* readers – especially those who own or run businesses – have come to rely on Cormac for an instant view on the merits or otherwise of the Chancellor's contribution from the Despatch Box.

Now the dust has settled on what turned out to be a controversial Budget, and a host of changes announced in previous Budgets have passed into law, Cormac is ready to present. Cormac's hard-hitting 45-minute briefing will cover:

- Assessment of tax changes
- New opportunities for business owners
- The Apprenticeship Levy
- Members' Voluntary Liquidations
- Raising outside investment
- Share incentives

Briefing 2 Outline

David Allan, a pensions specialist from 2hWealthcare, looks at the recent changes to pensions legislation and how remuneration strategy needs to be adjusted. David's presentation will be short and sharp – everything you need to know in 10 minutes.

- Understanding the annual allowance
- Tests for tapered allowance
- The relationship between salary, dividends and pension contributions
- Carry-forward
- Examples of how to secure maximum value for your pension

2hWealthcare
Independent Financial Advisers

Briefing 3 Outline

Steve Wilson, managing partner of 2hWealthcare, takes a macro view of the global economy and assesses where we may be in the business cycle and where we may be heading.

- Current assessment and headwinds facing the global economy
- Likely Central Bank and Government responses
- What are the implications for investors
- Investing in real assets

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Our Speakers

Cormac Marum

Cormac started his tax career serving seven years as a fully trained HM Inspector of Taxes with the Inland Revenue. He was a partner at KPMG where he gained 16 years extensive experience of providing commercial tax advice to clients before spending an additional two years at Grant Thornton. Cormac's particular interest is working with owner-managed businesses to minimise tax liabilities and create effective structures that make commercial sense. Exit planning, mergers and acquisitions, MBIs, MBOs, staff incentivisation and non-domiciled owners are all areas where Cormac enjoys providing solutions.

David Allan

David is a Diploma-qualified independent financial adviser with more than 16 years experience in the sector. He was recruited into 2hWealthcare for his skills in providing high quality advice to corporate clients and directors in relation to employee benefits and pension strategies.

Steve Wilson

Steve is an award-winning independent financial adviser with more than 30 years experience in financial services. Prior to establishing 2hWealthcare in partnership with Harwood Hutton, he worked with a number of major financial institutions in intermediary distribution. Steve is a keen student of financial history and likes to understand the factors and forces that are driving markets.

How To Book

To confirm your attendance, please email tonycheverall@harwoodhutton.co.uk
Please enter 'HH briefing' in the subject field.