



Sutton Parents Forum Café – July 6th, 2017 Wills & Trusts – Planning for the Future



Philip is the Managing Director of Renaissance Legal, he specialises in helping families and carers of disabled and vulnerable people plan for their future using Wills, Trusts, Powers of Attorney, Court of Protection applications and Inheritance Tax Planning.

He regularly speaks at and holds legal clinics & seminars on behalf of many local and national charities including Mencap, The Carers Centre, Age UK and Rett UK.

For families with a disabled or vulnerable child it's especially important to consider how to provide for your child if you are no longer there to care for them. Having an up to date Will in place goes some way to protect them, but in many cases it has the potential to create further problems. For example, by leaving a sum of money to a disabled or vulnerable person you put them at risk of financial abuse and you could impact their entitlement to means tested benefits. As an alternative to this, you may consider leaving money for a sibling or close family member to 'look after' on their behalf but this also carries significant risk if that person is later faced with divorce or bankruptcy.

On 6 July, Philip Warford will explain the options available to protect your loved ones using carefully prepared Wills and Trusts. Philip will cover how you can safeguard means tested benefits and how to provide financial security for *all* of your loved ones by explaining the different Trust options available and your Letter of Wishes. He will also talk about choosing the right Trustees and Guardians for children.

Philip will explain:

Why it is important to make a Will

- How you can protect a disabled person using Wills and Trusts
- The choice of Guardians for minor children
- The choice of Executors and Trustees
- The use of Letters of Wishes
- Making Gifts in a Will

Why use a Trust

- When should you set up a Trust
- How to protect means tested benefits

Your Trust Options

- Life interest Trusts
- Discretionary Trusts
- Disabled Person's Trust

Where 3, Robin Hood Lane, Sutton, SM1 2SW

Time 10 am until 1pm including refreshments and buffet lunch

To book your place

Email suttonparentsforum@outlook.com
Or call 020 3701 2175