

## A Modern Approach to Lifetime Tax Planning for Private Clients (with Precedents): Second Edition

*Christopher Whitehouse, Lesley King*  
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SECOND EDITION

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A Modern Approach to Lifetime Tax Planning for Private Clients (with Precedents) deals with the legal aspects of tax planning for private clients. It is a companion volume to the popular A Modern Approach to Wills, Administration and Estate Planning (with Precedents). This work begins by looking at the essential legal framework of giving and tax law through a combination of detailed and authoritative commentary, worked examples and precedents. It then examines specific topics including: trusts and settlements, the family, and looks at particular assets such as the family home, CGT main residence relief, chattels, businesses and farms, investments, and insurance based products. It then goes on to examine tax planning using statutory reliefs and exemptions including joint ownership of land/sharing arrangements, gifts for family maintenance, normal expenditure out of income and charitable giving. This new edition includes: \* Introduction of the Residential Nil Rate band (Finance (No 2) Act 2015) \* Effect of the Taxation of Pensions Act 2015 \* The impact of the Inheritance and Trustees Powers Act 2014 \* Changes to IHT charges on relevant property trusts \* Full text of the STEP Standard Provisions and STEP Investment Policy The authors' narrative commentary is supplemented by numerous precedents which are included on an accompanying CD-ROM, allowing users to download and adapt each document as necessary. [Subject: Tax Law, Inheritance Law]