



Chartered  
Institute of  
Taxation.

# Spring Virtual Conference 2026

Wednesday 29 and Thursday 30 April

The Spring Virtual Conference offers a range of topical lectures by leading tax experts, providing CPD opportunities that you can access from the comfort of your home or office.

The virtual conference will include:

- Conference materials provided in advance
- Opportunities for live delegate questions with all sessions
- Recordings of the sessions will be made available to all delegates afterwards enabling you to enjoy flexible access to all content when it is convenient to you.

**Book online at: [www.tax.org.uk/svc2026](http://www.tax.org.uk/svc2026)**

### **Continuing Professional Development (CPD):**

Attendance at conference sessions and lectures can count towards your CPD if the content is relevant to your working duties, in which case they should be recorded in your [CPD records](#). Please refer to the [CPD Regulations and Guidance](#) for the full details of requirements applying to members. You can also review our helpful [FAQs on Identifying Your CPD Requirements](#) for further information.

### **Conference Pricing**

Full conference (Wednesday and Thursday)

Half day conference (either Wednesday or Thursday)

- CIOT/ATT members and students: £210
- Non Members: £280

- CIOT/ATT members and students: £125
- Non Members: £195

If three or more delegates are attending the full conference from the same firm and booking together, there is a discount of £20 for each delegate.



# Spring Virtual Conference 2026

Wednesday 29 April

08.30-08.35

## Introduction by conference chair

Paul Aplin OBE BSc (Hons) FCA CTA (Fellow),  
Deputy President, Chartered Institute of Taxation

08.35-09.30

## The Personal Tax Roadmap: a bumpy ride

Jo Bateson BA (Hons) ATT CTA, Private Client Tax  
Partner, Mercer & Hole

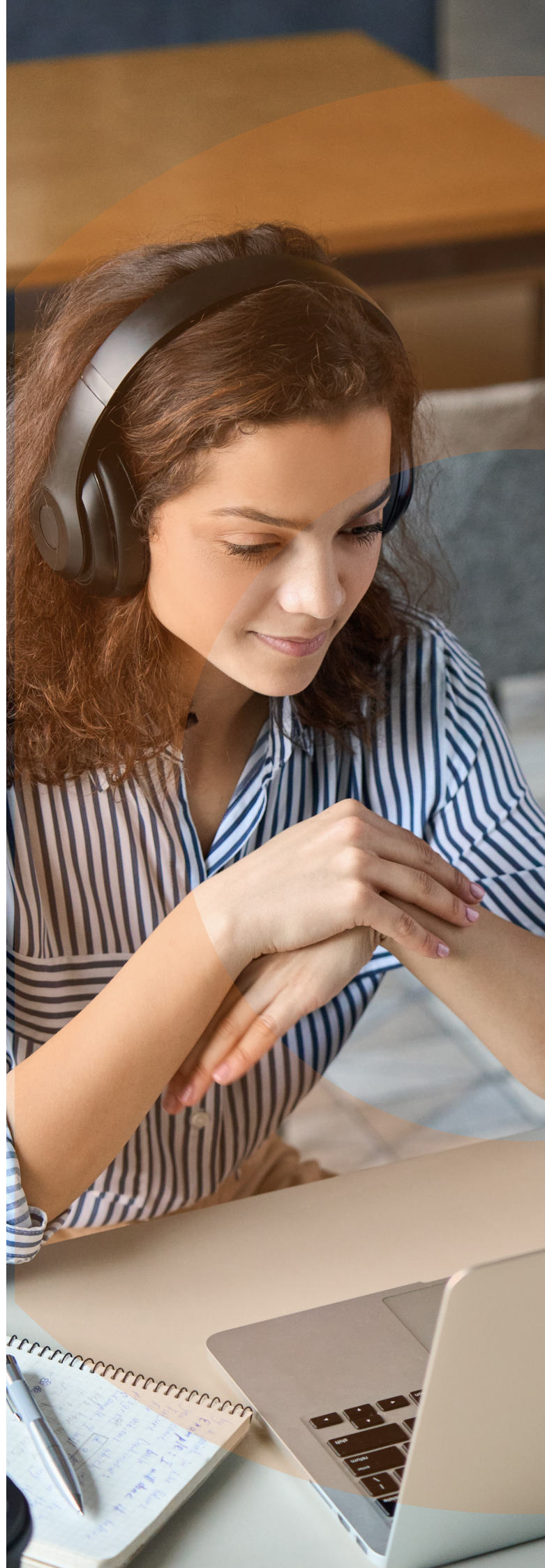
- Navigating fiscal drag, increases in tax rates on certain income types and the changing savings landscape
- A spotlight on the taxation of savings, investments and rental profits: the importance of understanding the foundations.

To include:

1. Reminder of the different income tax rates and the types of income that they apply to and when
2. Reminder of when income is treated as received as this will be important to determine the tax rates
3. Reminder on the changes to ISAs
4. Reminder of the taxation of investments such as QCBs, bonds, DDS (including excluded indexed securities), offshore fund (reporting and non-reporting; bond and non-bond funds), REITs - again because the difference will be important given the different tax rates
5. Discussion on the types of investments and the tax suitability covering ISAs, pensions, bonds, funds, offshore insurance bonds with some key trips and traps.

09.30-09.40

## Comfort Break





09.40-10.35

### **B2B Lifetime giving – friend or foe?**

Pat Nown CTA FCA ATT (Fellow),  
Consultant / CPD Lecturer (Tax)

This Back-to-Basics session considers a range of fundamentals to reflect on when following the recent trend in lifetime gifting. IHT developments has created a strong drive down this route but navigating the obstacles is not always an easy ride.

With a focus on essential issues to be considered when undertaking lifetime transactions for both CGT and IHT with practical examples throughout.

To include:

- Lifetime tools for IHT
- CGT - the lifetime tax hurdle - does gift relief solve the problem?
- Spouse related issues
- A question of sequence and timing.

10.35-10.45

### **Comfort Break**

10.45-11.40

### **From HMRC to the OECD: An overview of Crypto Taxation**

Moniza Syeda, BSc(econ) Economics, ACA, Head of International Tax at Tolley (LexisNexis UK)

- A quick recap on how Crypto is taxed in the UK
- An overview of OECD / EU / US approaches
- Are there gaps in the global net?
- What do UK practitioners need to be wary of?
- Wider impact - is the UK over-regulating or have we got it right?

# Spring Virtual Conference 2026

11.40-11.55

## Professional standards: How to optimise compliance whilst minimising admin

Jane Mellor CTA ATT, Head of Professional Standards, CIOT

- Laying good foundations – taking on clients and how to ease the admin
- Managing the ongoing relationship – documentation, HMRC queries, using specialists and conflicts of interest
- Keeping up to date – fitting in CPD and awareness of updates to guidance
- How to be ready if things go wrong – complaints, PII and other CIOT requirements.

11.55-12.05

## Comfort Break

12.05-13.00

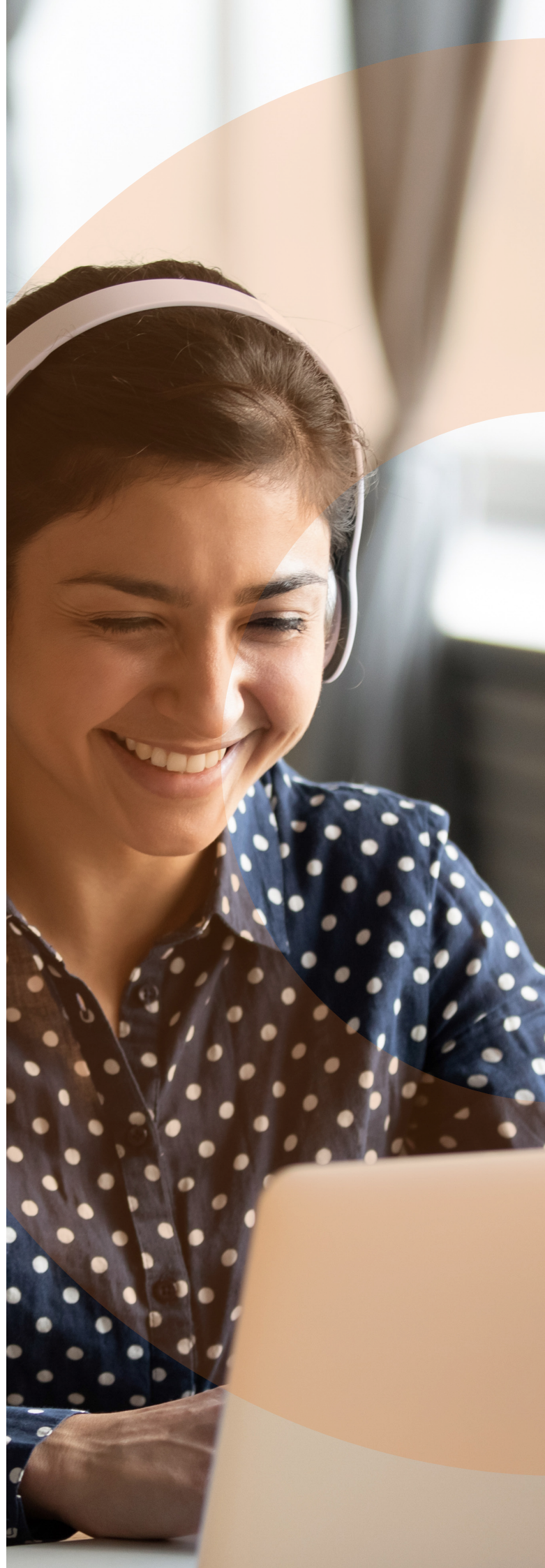
## BPR / APR changes: what the new limits on 100% relief mean for tax planning

John D Bunker LLB CTA TEP Freelance Lecturer and Consultant Solicitor / CTA with Irwin Mitchell

- Laying good foundations – taking on clients. The £2.5m increased 100% allowance for BPR / APR & key features for planning
- Lifetime gifts of £3.15m – what's possible & what to watch for in personal or trust gifts
- The transferability of the £2.5m allowance to spouses: when not to rely upon it
- How to maximise IHT mitigation through will drafting and use of post-death variations.

13.00

## Close of conference



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Thursday 30 April

08.30–08.35

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Deputy President, Chartered Institute of  
Taxation

08.35–09.30

## The Reconstructed Anti-Avoidance Rules for Reconstructions

Pete Miller CTA (Fellow), Head of Corporate  
Tax, Jerroms Miller

- What's old?
- What's new?
- What's borrowed?
- What makes me blue?

09.30–09.40

## Comfort Break

09.40–10.35

## OMB profit extraction in 2025/26 and beyond

Peter Rayney CTA (Fellow) FCA TEP

- What's best now – dividends or bonuses?
- Do spousal dividends still work?
- Can I still provide income to the children?
- Using family discretionary trusts
- Capital allowances – a brief update.

10.35–10.45

## Comfort Break

10.45–11.40

## 2026 Property Tax Reform: Risks, Reliefs and Revaluations

Kersten Muller, Partner, Real Estate Tax, S&W  
Partners LLP

- The new Incorporation Relief regime from April 2026 – what does it mean, new reporting requirements, practical implications for landlords and advisers
- Business Rates reform – changes from April 2026, new multipliers & reliefs, revaluation





- Business Rates reliefs – transitional reliefs, small businesses and support for Retail, Hospitality & Leisure Industry
- Practical guidance for advisers – compliance risks, disclosure expectations, planning opportunities.

11.40-11.55

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11.55-12.05

**Comfort Break**

12.05-13.00

**The Shopper's Guide to VAT Advice**

Etienne Wong, Old Square Tax Chambers

- Apples and oranges – “VAT avoidance” is not tax avoidance (as commonly understood), and why the difference is material
- Who you gonna call – the need to balance the technical and the practical; choosing the right advisor
- What you really, really want – the purpose of the advice
- Diamonds and rust – is it always about litigation?
- You only get one shot – when and why the First-tier is key.

13.00

**Close of conference**