Chartered Institute of Taxation.

Autumn Residential Conference 2026

Friday 18 – Sunday 20 September 2026

Starting at 13:45 on Friday 18 September, the Institute's Conference offers a range of topical lectures presented by leading tax speakers. A group session will support the lectures and there will be displays of tax books and software by leading providers. The conference is open to members and non-members.

The early bird fee (£685) will run until the end of July 2026. Thereafter the fee, inclusive of accommodation and meals, is £765.

Book online at: **tax.org.uk/arc2026**

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

The early bird registration fee is £685.

This increases to £765 after the end of July 2026.

There is a discount of £30 per delegate if three or more delegates from the same organisation register to attend the conference.

Please note that car parking can be extremely difficult in central Cambridge. An additional charge of £18 is payable to secure a parking space at the Queens' College Sports Ground. All spaces should be pre-booked and will be allocated by the Institute on a first come, first served basis.

Autumn Residential Conference 2026

Friday 18 September 2026

13:45-13:50

Introduction by conference chairman
Jonathan Riley CTA (Fellow), Vice-President, Chartered Institute of Taxation

13:50-14:50

Dying tidily – don't bequeath chaos!
Rev Matthew Hutton DL, CTA (Fellow), Retired TEP, author of Your Last Gift – Getting Your Affairs in Order

Matthew will suggest how you can best advise your private clients (and even yourselves) to prepare their nearest and dearest in a practical sense for what happens post-death.

- The No 1 priority of relationships, with reconciliation where possible, acknowledging the power of forgiveness.
- Lasting powers of Attorney, wills and funeral arrangements.
- And then the rest, including dependants, digital assets, finances and responsibilities, plus a whole range of conversations.
- And do get those records in place, with regular updating.

14:55-15:55

Mitigating IHT after new limits on BPR/APR and pensions to be caught from April 2027?
John D Bunker LLB CTA TEP, Freelance Lecturer, Solicitor and Chartered Tax Adviser, JDB Legal and Tax Training Ltd

After the huge reforms to inheritance tax (IHT) in 2026/27, now is a good time to take stock of current tax planning strategies for mitigating IHT.

John will explore:-
- Key things tax advisers need to know about using wills, and post-death variations to "work the system" given "stealth taxation".

- Major IHT planning options for clients with farms and businesses.
- Lifetime business succession ideas and maximising the £2.5m 100% allowance and lifetime gifts – outright or in trust.
- Pensions: with the changes coming, what planning should tax advisers be doing with clients?
- What place life assurance and other estate planning, including the focus for clients with neither farm/business or pensions?

15:55–16:25

Tea

16:25–17:10

Keynote Address

17:15–18:30

Panel session: agent registration
Chaired by Paul Aplin OBE BSc (Hons) FCA CTA (Fellow), President, Chartered Institute of Taxation

- Alison Kerrey MA (Cantab) MPhil CTA, Tax Technical Partner, Moore Kingston Smith LLP
- Jane Mellor BSc CTA ATT, Head of Professional Standards, Chartered Institute of Taxation and Association of Taxation Technicians
- Mike Thomas, Head of Agent Services Policy, HMRC

20:00

Drinks followed by dinner

Saturday 19 September 2026

09:00–10:00

From P11Ds to payroll: preparing for the mandatory payrolling of benefits
Sarah Hewson LLB (Hons) Solicitor ATT CTA (Fellow), Head of Employment Tax, Crowe UK LLP

- The phased introduction of mandatory payrolling and what it means in practice.
- Key preparation points for 2027 and 2028.
- Common complexities, including benefits that are difficult to value or correct through payroll.
- Practical steps for a smooth transition, including data, systems, processes and employee communications.

10:00–10:15

Professional Standards update

Jane Mellor BSc CTA ATT, Head of Professional Standards, Chartered Institute of Taxation and Association of Taxation Technicians

10:15–10:45

Coffee

10:45–11:45

Professional judgement in R&D tax: advocate or gatekeeper?

Jenny Tragner, Partner, S&W

- The role of tax advisers in supporting clients to identify R&D.
- Balancing advocacy with scepticism and communicating risk.
- Managing technical and financial stakeholders.
- Ethical obligations: protecting you and your client.

11:45–13:15

Working session

Based on lectures by John Bunker, Sarah Hewson and Jenny Tragner

13:15–14:15

Lunch

14:15–15:30

MTD in practice – interactive session with Q&As

Chaired by: Jeremy Coker BSc (Hons) FCA FCCA CTA ATT, Partner, Oury Clark Chartered Accountants

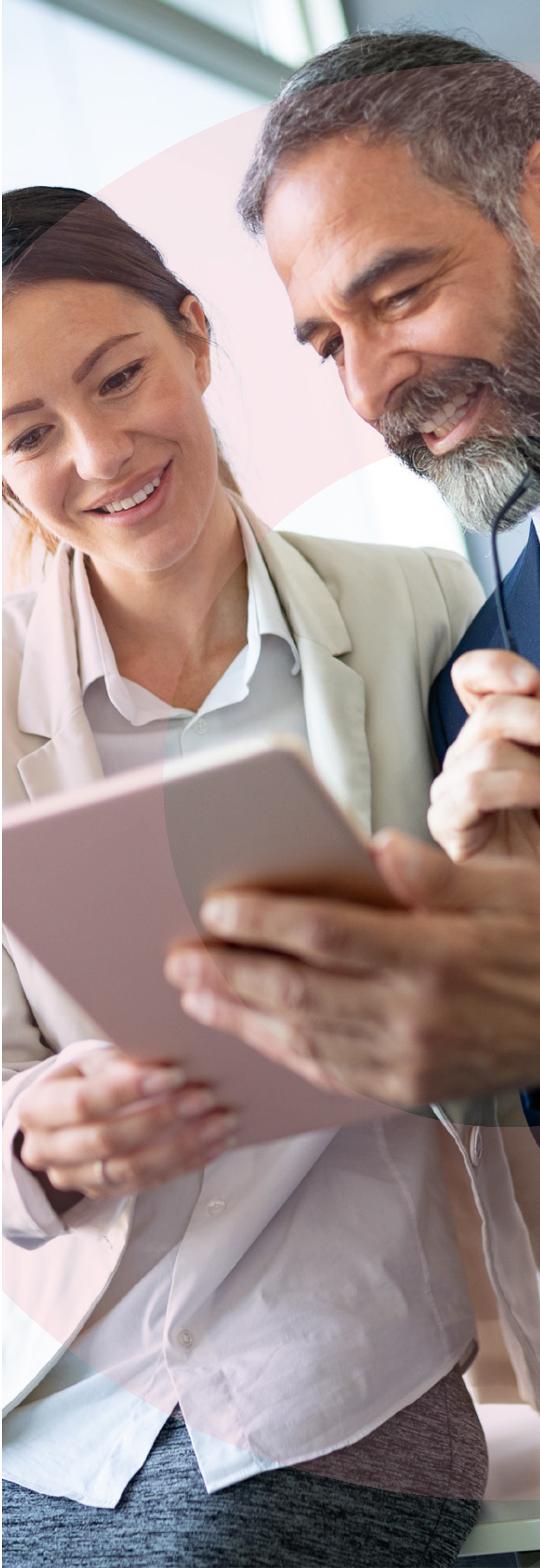
- Emma Rawson OBE DPhil, ATT, CTA, FCA, Director of Public Policy, ATT
- Sharron West, ATT, CTA, Technical Officer, Low Incomes Tax Reform Group
- Kevin Sefton, BA (Oxon), ACA, CTA, CEO, untied
- HMRC representative TBC

15:30–16:00

Head office update

16:00–16:30

Tea



16:30–17:30

Stamp taxes for typical corporate transactions

Peter Rayney CTA (Fellow), FCA, TEP, Peter Rayney Tax Consulting Ltd

- Ensuring valid claims for stamp duty exemption on share exchanges.
- Potential dangers of 77A FA 1986 on share exchanges.
- Stamp duty and Stamp Duty Land Tax on corporate reconstructions.
- How does SDLT work on incorporating property investment businesses?

19:00

Drinks reception followed by dinner with guest speaker Libby Jackson OBE, Space Expert

Sunday 20 September 2026

09:15–10:15

Recent cases – a discussion of a sample of recent case developments

Keith Gordon MA FCA Barrister, Temple Tax Chambers

The cases will cover a range of topics. However, the following recent (2026) cases will be covered:

- Professional Game Match Officials Ltd – the latest development in this employment status saga.
- Orsted West of Duddon Sands (UK) Ltd – availability of capital allowances on feasibility studies.
- Lifeplus Europe Ltd – Schedule 36 information notices and documents held by group companies.
- Michael Parker – insights into the application of the statutory residence test – excluding midnights from the daycount.
- Christopher Brzezicki – whether land is residential for SDLT purposes.

10:20-11:20

Top 10 Corporate Tax red hot issues

Jeremy Mindell BA (Hons) CTA, Director, Primondell

This presentation will cover key corporate tax developments practitioners need to be aware of, including:

- Capital allowance opportunities.
- Research and development changes.
- Creative tax relief changes.
- Changes to CT filing requirements.
- Additional reporting for close companies.
- Disincorporation.
- Pillar 2.
- Transfer Pricing.
- Other international developments.
- Permanent establishment changes.

11:20-11:50

Coffee

11:50-12:50

Navigating partnership tax: latest insights

Jitendra Patel BSc (Hons) CTA, Principal, Partnerships & Professional Services, BDO and Vice-Chair, Owner-Managed Business Technical Committee, CIOT

This session will cover areas of complexity for business partnerships and their partners and offer insights based on recent developments as well as practical experience.

- Salaried members – the latest position following recent changes and the BlueCrest saga.
- Mixed partnerships – partner equity incentive arrangements and the Boston Consulting Group decision.
- The corporate intangibles problem – related party rules including insights from Muller.
- M&A transactions involving partnerships – points to consider.

12:50

Close of conference