



**LONDON CONFERENCE held at THE KENILWORTH HOTEL GREAT RUSSELL STREET ON FRIDAY 14<sup>th</sup> and SATURDAY 15<sup>th</sup> JUNE 2019**

### **PROGRAMME AND AGENDA FOR MEETINGS**



**Friday: 13.00-13.15 Registration**

**followed by sandwich Lunch and refreshments at the Hotel.**

**14.20 WELCOME and INTRODUCTIONS by the President.**

**14.30 PRESENTATION: Jon Cunliffe Chief Investment Officer with Charles Stanley & Co Ltd will give a presentation.**



Jon joined Charles Stanley in January 2016 and is the Chief Investment Officer of the Asset Management Division and is also Head of the firm's Research Team. He began his career at the Bank of England, becoming an Official in the Gilt Edged and Money Market Division in 1994. He subsequently held a number of senior fixed income roles at Lombard Odier, ABN Amro Asset Management and Aberdeen Asset Management, before joining Tesco's in-house pension team as Head of Fixed Income and Asset Allocation. Jon holds a BA (Hons) in Divinity from Robinson College Cambridge.

Charles Stanley & Co. Limited is one of the UK's leading investment management companies, dedicated to serving the private investor, charities, trusts and professional institutes. Jon can explain how a modern firm like Charles Stanley operates. How does he see the global markets in the next decade? Where will he be putting the asset management investments? How does he go about carrying out the firm's research? With Brexit, Trump and tensions in the Far East, as well as a downturn in China there are plenty of uncertainties which must all be reflected in the present investment sector. How does one factor in these imponderables when making investment decisions. How vibrant is the UK economy? What

effect would a Labour government have on the economy? Does he believe the City of London Financial Sector will survive in the post Brexit era? Will Frankfurt and Paris take over? What will the long term effects of Brexit be? Where should a wise investor be investing his money? Following his presentation he and his colleague Tracy Smith (a Chartered Wealth Manager and Investment Manager with the company in Plymouth) will be willing to answer our questions.

**15.30 Tea and coffee break.**

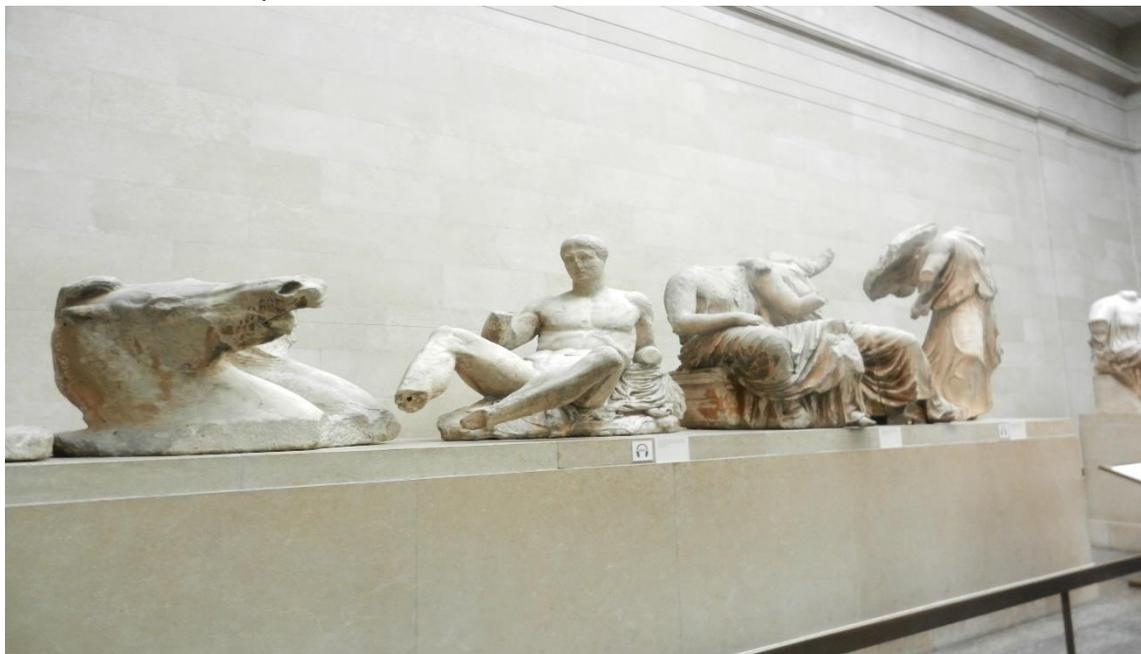
**16.00 The State's dependence on the internet and how it is used for tax reporting in UK.**

**Geoff Rogers** and **George Dub** will explain how this is being introduced in the UK. VAT returns must be made using the internet as from April 2019. How is this dealt with elsewhere in Europe **Fabian Baikhardt** will confirm what happens in Switzerland and maybe we can hear about Italy .

**17.00 Brexit** -an update. Where are we now?

**17.30** close of session.

**19.25** We leave for dinner at The Blue Door Bistro, The Montague on the Gardens 15 Montague Street, and approximately 10 minutes' walk from our hotel passing The British Museum on the way.



**The Blue Door Bistro:** Fine dining in the heart of Bloomsbury.

“The Blue Door Bistro provides a welcoming and informal bistro-style setting, with a superb à la Carte menu to match. Warm and cosy by evening, the room is decorated on three sides with a panoramic view of London circa 1849. Commended with an AA rosette and we are accredited by the Sustainable Restaurant Association with 2 stars so you can always rely on responsibly sourced food and impeccable service. We make every effort to avoid using any genetically modified foods and insist on only the freshest of ingredients.....”

## Saturday

### 9.30 Members meeting which will include the following

**AGM.** Reports from officers and elections plus consideration of TORUS' financial position.

### 10.30 Coffee break

**11.00 resumption for 'Country reports' on important tax and legal changes since Lyons meeting in May 2018 by delegates as usual:**

**UK's** will include a consideration of '*Transparency against Secrecy*'

- Changes in anti-money laundering rules
- checking the source of funds: UK trusts have lost the secrecy they enjoyed
- offshore trusts beneficial interests to be public 2020
- registration of trusts in UK with the Revenue and Customs in March 2018.
- The new General Data Protection Regulation came into effect on 25<sup>th</sup> May 2018. What is it and how has it been implemented in the EU and Switzerland? Presentation and discussion led by David Lambert

**Other country reports.**

**12.30 close of meeting.**

**12.45 LUNCH in the hotel- (available for all).**

**14.00/14.10** Leave hotel for St Paul's Cathedral to meet Paula Cooze who will conduct our guided tour of the City of London which will include Roman remains, the Guildhall, Bank of England and other iconic buildings within the Square Mile, concluding it is hoped with a visit to the gardens of 120 Fenchurch Street at approximately 16.00.





After the visit we will return independently to the hotel.

**19.25** Leave for Dinner at Savoir Faire about 5 minutes' walk from the Hotel on New Oxford Street.



“This is neither a chain restaurant nor a franchise, it is a family owned and run restaurant and has been in business since 1995.

We cook all our food, sauces, bread, pates and desserts on the premises. Everything is homemade with fresh and natural ingredients. If we can't make it, we don't have it! We never use precooked food, flavour enhancers or preservatives. We only use natural butter, cholesterol free oils or olive oil.

Our wine has been sourced from the best wine producing countries in the world and the wine list has been put together with care, to offer the best value for money wines. The price you see is all you pay. There are no hidden charges and all the meals come with vegetables and a basket of freshly baked bread. We try to give the highest quality food at the lowest possible price. There are very few restaurants that can make this claim.....”