

Medical Health Check

Tax, your pension and retirement planning for you and your practice

With all the changes to tax legislation and your pension scheme, the majority of doctors are questioning how these will impact them personally.

The Seminar aims to provide a simple answer to your questions.



Sowerby FRS

Chartered Accountants and Business Advisers



Medical Money Management
INDEPENDENT ADVISERS FOR PROFESSIONALS



Topics

Taxation and Pension Relief

Richard Skewis will explain how the changes to tax legislation on pensions will affect you and how to calculate any potential tax charge.

Your Pensions and the Future

Stephen Price will explain in more detail Simplifying your Pension Options. This will cover both the NHS Superannuation Scheme and Personal Pensions.

Retirement

Richard Skewis will summarise some of the points that you as an individual and your practice will need to consider when one of your partners retires.

Property Values and Rental Yields

Simon Weightman will discuss the current market for property values and rental yield which account for the majority of any value within the partnership account.

Funding

Gareth Crookes will guide you through the banks current criteria for financing medicals practices'

Speakers



Richard Skewis
FCCA
Partner

Sowerby FRS
Chartered
Accountants

Richard qualified in 1994 and became a partner within the practice in 1996. He has over 20 years' experience advising the medical profession. He specialises in offering both tax effective individual advice and commercial advice to a growing number of practices throughout the region.



Steve Price
IFA

Medical Money
Management

Steve joined Medical Money Management in May 2009. He has been providing financial advice to the to the medical profession for the past 15 years and has been an IFA for more than 20 years. Steve specialises in advising on investments and works closely with his clients and their other professional advisers in both pre and post-retirement planning.



Simon Weightman
BSc MRICS IRRV
Director

Clark Weightman

Simon is a general practice Commercial Chartered Surveyor and Director of Clark Weightman. He specialises in bank valuations, healthcare properties and business rates. Simon advises a wide range of commercial companies, GP practices/healthcare partnership and NHS Trusts throughout Yorkshire, Lincolnshire and other regions.



Gareth Crookes
Business
Development
Manager

Royal Bank of
Scotland

Gareth joined RBS 22 years ago and is an experienced banking professional working in the healthcare sector for the past 15 years. He is responsible for healthcare in the North East of England.

Seminar details:

Date and time:

7th February 2012

Time: 6.30pm - 9pm

6.30 pm	Registration
6.45pm	Start
7.45pm	Questions
8pm	Food and wine

Venue:

Lazaats

Tel : (01482) 847900

Woodhill Way | Cottingham | East Yorkshire | HU16 5SX

www.lazaats.com

RSVP:

Please call Wendy Simpson on 01482 888820 or
email: wendy.simpson@sowerbyfrs.co.uk to reserve a place.

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