SESSIONS

REGULATORY AND TAX ISSUES FOR FUNDS - 26/07/2021

Regulatory and Tax Issues for Funds

26 July 2021
Digital Conference
BST/UTC+1 Time Zone

Pre-Event Networking

09:00 - 10:00
Main Conference Stage

Opening Remarks & Welcome

10:00 - 10:10
Main Conference Stage

Participants

Jenny Wheater - International Counsel, DEBEVOISE & PLIMPTON LLP

Key Current Issues on Carried Interest and Co-Investment

10:10 - 10:50
Main Conference Stage

Participants

Paul Eastham - Senior Associate, DEBEVOISE & PLIMPTON LLP

Developments on Fund Tax Compliance

10:50 - 11:30
Main Conference Stage

Participants

Simon Hart - Director, KPMG

Serena Bell - Tax Director, KPMG

Morning Coffee Break

11:30 - 11:50
Main Conference Stage

UK Asset Holding Company Regime; Consultation Update and Implications

11:50 - 12:30
Main Conference Stage

Participants

Stephen Pevsner - Partner, PROSKAUER

Russell Warren - Partner, TRAVERS SMITH

Sophie Lloyd - Senior Associate, TRAVERS SMITH

Brexit, COVID and US Tax Implications For Asset Managers

12:30 - 13:10
Main Conference Stage

Participants

David Nook - Director - US Tax, DELOITTE

Emily Clark - Head of Tax, TRAVERS SMITH

Lunch Break & Networking

13:10 - 13:40
Main Conference Stage

Overview of the UK Funds Regime and Q&A with HM Treasury

13:40 - 14:10
Main Conference Stage

Participants

Matthew Parry - Financial Services Taxation, HM TREASURY

Moderator: Yash Rupal - Partner, SIMPSON THACHER AND BARTLETT LLP

Industry Panel: Handling Practical Issues

14:10 - 15:00
Main Conference Stage

- Dealing with advice and advisers
- Addressing compliance consistency with individuals with different views/circumstances
- Different tax results in different jurisdictions – handling potential problems
- Investor concerns on management incentives
- Examples of issues from carry holders from a range of jurisdictions

Participants

Ed Nevens - Head of Tax, CINVEN

Sandy Bhogal - Partner, GIBSON DUNN & CRUTCHER

Moderator: Jenny Wheater - International Counsel, DEBEVOISE & PLIMPTON LLP

Jill Hardie - Senior Structuring Adviser, Private Markets & Real Estate Structuring, ABERDEEN STANDARD

Afternoon Coffee Break & Networking

15:00 - 15:20
Main Conference Stage

Prudential Regime for Investment Firms: Overview and Updates

15:20 - 16:00
Main Conference Stage

- Introduction and concept of separate regimes
- Employment income regime
- Self-employed regime
- Areas of ambiguity and HMRC guidance

Participants

Andrew Henderson - Partner, MACFARLANES

Shailen Patel - Head of Corporate Advisory, MACFARLANES

The Long-Term Asset Fund – Opening Up Private Assets to UK Retail Investors and Pension Savers

16:00 - 16:40
Main Conference Stage

Participants

Alicia Thomas - Partner - Tax & Reward, MACFARLANES

Lora Froud - Partner - Investment Management, MACFARLANES

Sustainable Finance Disclosure Regulation

16:40 - 17:20
Main Conference Stage

Participants

Danny Riding - Senior Counsel, Financial Services and Markets, TRAVERS SMITH

Closing remarks

17:20 - 17:30
Main Conference Stage

Participants

Jenny Wheater - International Counsel, DEBEVOISE & PLIMPTON LLP

SCHEDULE

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14:00	**14:10** - Industry Panel: Handling Practical Issues
15:00	**15:00** - Afternoon Coffee Break & Networking **15:20** - Prudential Regime for Investment Firms: Overview and Updates
16:00	**16:00** - The Long-Term Asset Fund – Opening Up Private Assets to UK Retail Investors and Pension Savers **16:40** - Sustainable Finance Disclosure Regulation
17:00	**17:20** - Closing remarks