Richard Ansah

Areas of Specialism & Professional Experience

Principal/ Owner/ Estate Planning Practitioner (ONCE Estate Planning Practitioners, London, May 2019 – Present)

Areas of Specialism:

- Gifting Strategies for Inheritance Tax Mitigation
- Property Investors (Residential and Commercial)
- Asset Protection Strategies
- Business Succession Planning including:
  - Business Property Relief (BPR)
  - Cross Options Agreement/ Business Wills & Shareholder Agreements
- Lifetime & Will Trust Planning Strategies including
  - Periodic/Anniversary Charge Mitigation Strategies
  - Gift With Reservation of Benefit (GROB) Concession Planning

Affiliations & Membership

- **Student Member of the Society of Trust & Estate Practitioners (STEP) -** (21st June 2021 to Present) – STEP Student Membership Number: 284711
  - Actively working towards become a Registered Trust and Estate Practitioner (TEP) with Full Member Status by January 2024
- **Member of Countrywide Tax & Trust Corporation Ltd** (May 2021 to Present)
- **Member of the Society of Will Writers** (MSWW, Feb 2020 – Present):
  - Membership Number: AN756112502/20
- **Member of New Leaf Will Writers Federation** (NLWWF, May 2019 – Feb 2020)
  - **(NLWWF) –** Will Writing/ Estate Planning Induction Course (May 2019)
- **Chartered Institute of Insurance** FP2 (Protection, Savings, and investment) – May 2005
- **Institute of Financial Services:** Certificate in Mortgage Advice & Practice **(**CeMAP) – Mar 2005

Professional Indemnity Insured Activities:

- Will Writing
- Lifetime Trusts
- Power of Attorney
- Tax Implications related to Trusts & Will Writing
- Will Storage
- Tenancy Severance
- Pre-Paid Funeral Plans
- £2.5M. Insured Activities

Continuous Professional Development (CPD)

- **Society of Trusts & Estate Practitioners (STEP)**
    1. STEP Certificate for Financial Advisers (Trusts & Estate Planning): July – Nov 2021

- **Country Wide Tax & Trust Corporation – Courses Attended 2021**
    1. LPA's Deputyship, Financial Assessments & Challenges – 23rd July 2021
    2. Impact of Divorce and Separation on Estate Planning – 22nd July 2021
    3. Probate - Estate Planners Guide to Estate Administration – 19th July 2021
    4. Planning for The Buy to Let Client From 1 to 50 Properties – 5th July 2021
    5. The Definitive Guide to Trusts & Taxation of Trusts – 24th – 26th July 2021
    6. Will Writing, Estate Planning & LPA Drafting – 15th – 22nd June 2021

- **Professional Conferences (Attended Between March & July 2021):**
    1. Virtual Conference: Wills and Probate Update 2021
    2. Virtual Conference: Wills, Probate and Advising the Elderly Update 2020
    3. Varying The Disposition of Estates and Dismantling Unwanted Discretionary Trusts
    4. Managing Trusts
    5. Lifetime Gifts: Validity and Other Issues
    6. Lifetime Gifts: Inheritance Act Issues
    7. Drafting and Using Lasting Power of Attorneys
    8. Claims under the Inheritance Act 1975
    9. Local authority Financial Assessment Update
    10. Planning and Drafting Wills for Clients with Businesses
    11. Drafting Business Lasting Power of Attorneys
    12. Planning & Drafting Wills for Modern Families
    13. Estate Planning for Families with Moderate Wealth
    14. Current Issues in Will Drafting

- **The College of Will Writing - Courses Attended 2020/2021 (In Person & Online):**
    1. The Practicalities of Assessing Mental Capacity – 27th April 2021
    2. Drafting Business LPAs – 15th April 2021
    3. Introduction to Estate Planning & Trusts - 11th Feb 2020
    4. All You Need to Know About Trusts - 25th & 26th Feb 2020
    5. Drafting Business LPA's - 29th June 2020
    6. Understanding Deputyships - 13th July 2020
    7. How to Take Perfect Instructions - 15th July 2020
    8. Inheritance Tax – Beyond Drafting Wills - 22nd Oct 2020
    9. Vulnerable Clients & Later Life Planning - 10th Nov 2020

- **ACER Legal Solutions (Trust Suite) –** Mini Course: Understanding the Asset Allocation Trust (Lifetime Trust) – 12th March 2021.

General Education

University of Leeds MSc (Hons) Computational Fluid Dynamics (August 2000)

University of Sussex MEng (Hons) Mechanical Engineering with North American Studies (July 1999)

The Society of Will Writers

Certificate of Code Compliance

This is awarded to:

Richard Ansah MSWW
Of ONCE ESTATE PLANNING PRACTITIONERS

In Recognition of Achieving SWW Code Compliance

Expires: 28th February 2022

Signed:

Anthony Belcher
Director General