The Law Society

Private Client

www.lawsociety.org.uk/privateclient

Private Client Section Engagement Programme 2018-2019

Foreword

Welcome to the Law Society's Private Client Section 2018/2019 engagement programme.

The Section was established in 1997, to promote best practice and address current issues and challenges facing the community. The Advisory Committee's role is to provide expert practitioner input, guiding the Law Society on identifying issues, generating content and a wide variety of events, to ensure the engagement programme is both relevant and practical.

To design the programme of member support, the Section receives input from the Section Advisory committee and the wider membership through feedback from surveys, on-line discussions groups, events, etc.

The committee is keen to engage with the wider private client community and to hear from you, our members, to assist us in shaping your Section. To give us your thoughts, seek our support or just to connect, please get in touch at privateclientsection@lawsociety.org.uk.

Fiona Heald
Chair of the Private Client Section Advisory Committee

Our programme for this year

Below is the planned programme of Private Client Section support from 1 November 2018 to 31 October 2019. (Note the programme is subject to change). All the items below are inclusive to Private Client Section members except those marked with a * which are discounted to Section members

Month	Name of product	Topic	Location
Jan	PS E-newsletter	Various	Online
31 January	Private Client Section seminar	Soft skills seminar: Deathbed wills - for practitioners preparing wills at the end of life	London
31 January	Private Client Section seminar	Case law seminar: Constructive methods to successfully navigate the CoP and beyond	London
February	PS E-newsletter	Various	Online
5 February	Private Client Section seminar	Soft skills seminar: Deathbed wills - for practitioners preparing wills at the end of life	Birmingham
5 February	Private Client Section seminar	Case law seminar: Constructive methods to successfully navigate the CoP and beyond	Birmingham
February	PS magazine	Various	Print
12 February	Private Client Section seminar	Soft skills seminar: Deathbed wills - for practitioners preparing wills at the end of life	Manchester
12 February	Private Client Section seminar	Case law seminar: Constructive methods to successfully navigate the CoP and beyond	Manchester
20 February	*Webinar	Lasting Powers of Attorney update	Online
7 March	*Private Client Section conference	Cross border conference – Insights into foreign assets	London
March	PS E-newsletter	Various	Online

25 March	Private Client Section webinar	Managing ashes, pets and possessions	Online
24 April	Private Client Section seminar	IHT and death: a tax update	London
April	PS E-newsletter	Various	Online
30 April	Private Client Section seminar	IHT and death: a tax update	Birmingham
May	PS magazine	Various	Print
9 May	Private Client Section seminar	IHT and death: a tax update	Manchester
May	PS E-newsletter	Various	Online
June	PS E-newsletter	Various	Online
28 June	*Private Client Section conference	Annual conference	London
July	PS E-newsletter	Various	Online
August	PS magazine	Various	Print
Sept	PS E-newsletter	Various	Online
September	PS magazine	Various	Print
19 September	Private Client Section seminar	Developments in private client practice	Birmingham
24 September	Private Client Section seminar	Developments in private client practice	London
3 October	Private Client Section seminar	Developments in private client practice	Manchester
October	PS E-newsletter	Various	Online
18 October	*Private Client Section conference	Elderly and vulnerable client care	London
November	PS magazine	Various	Print
December	PS E-newsletter	Various	Online

Keep track of your professional learning

The Private Client Section have compiled a list of competency codes to help you record your professional development. Keeping track of your training can seem like one more task on a solicitor's to-do list. We have listed the minimum Solicitors Regulation Authority (SRA) continuing competency codes covered in our support for Private Client Section members.

What we've covered

The table below lists the SRA codes covered between 1 November 2017 and 31 October 2018. We will update this training tracker throughout the year, as the 2018-19 programme develops.

When	Name of product	Product type	SRA codes
November 2017	*PS* magazine: Back to Basics: Annual tax compliance in probate cases	Inclusive	A2
January / February 2018	Seminar: Elderly client case law	Inclusive	A2, B1, B2
January / February 2018	Seminar: Elderly client soft-skills	Inclusive	A1, C1, C2
February 2018	*PS* Magazine: Back to basics: Investment bonds	Inclusive	A2
March 2018	Cross border conference	Discounted	A2
April 2018	Webinar: Tax update 2018 – hot topics for private client solicitors	Discounted	A2, A4
April 2018	Seminar: Inheritance tax case law	Inclusive	A2, B1, D3
May 2018	*PS* Magazine: Back to Basics: Working with farming accountants	Inclusive	A1, A2, A4, A5
June 2018	Webinar: Drafting wills to cover assets in overseas jurisdiction	Inclusive	A2, A4
June 2018	Private Client Section annual conference	Discounted	A2
July 2018	Webinar: Family business succession: how to advise your clients	Discounted	A2, A4
July 2018	Webinar: Money laundering for Private Client advisers	Inclusive	A2, A4
August 2018	*PS* Magazine: Back to Basics: Deeds of variation and disclaimers	Inclusive	A1, A2, A4, A5
September 2018	Webinar: Court of Protection cases – achieving a fair reward for your valuable work	Inclusive	A2, A4, B1, B2, B3
September 2018	Seminar: Recent developments in private client case law	Inclusive	A1, A2, A4, A5, B1, B2, B3, B4
October 2018	Webinar: Buying and selling a family business	Discounted	A2, A4
October 2018	Elderly and vulnerable client care conference	Discounted	A2
October 2018	Webinar: Pensions update – demystifying the current regime	Inclusive	A2, A4

Events

Over the next year the Section will host a range of events on issues that matter to private client lawyers.

Details of these events will be published on our website (note the programme is subject to change): www.lawsociety.org.uk/private-client/events

Membership of the Section includes free access to the Private Client Section regional seminars and the podcast recordings of these events as well as discount on the Private Client Section London conferences

New - Private Client Section Regional Elderly client double seminars

When: **January and February 2019:**
London (31 Jan), Birmingham (5 Feb), Manchester (12 Feb).
Time: **From 16:15 - 19:25**
Venues: **The Law Society, 113 Chancery Lane, London, WC2A 1PL**
Radisson Blu Birmingham, 12 Holloway Circus, Birmingham, B1 1BT
The University of Law, 2 New York Street, Manchester, M1 4HJ
Cost: **Free for Section members, From £35 + VAT for non-members**

For 2019, based on member feedback, we are continuing with a new approach to our elderly client inclusive regional Section events as members have asked for:

- Practical support in communicating with elderly/vulnerable clients
- Longer events to justify their travel times
- More networking time with their peers

In response we are continuing to pilot our new Elderly Client double seminars. This (inclusive to Section member) event will include:

- Soft skills seminar: Deathbed wills - for practitioners preparing wills at the end of life
- Case law seminar: Constructive methods to successfully navigate the CoP and beyond

Speakers:

- Soft skills – Ian Bond, director and head of trusts and estates, Talbots Law Ltd
- Case law – Helen Clarke solicitor, lecturer, in-house trainer.

Private Client Section: Cross border conference Insights into foreign assets

When: **7 March 2019**
Venue: **The Law Society, 113 Chancery Lane, London, WC2A 1PL**
Cost: **£300 + VAT for Section members,**
£195 + VAT for members working for NFP
From £345 + VAT for non-members

International private client work is an increasingly complex and changing environment. Stay up to date by attending our 2019 cross border conference.

The full-day conference programme comprises expert speakers from various jurisdictions across the private client cross-border world. This event is aimed at solicitors and professionals involved in advising private clients and trustees who hold assets abroad.

09:00-09:30 **Registration and refreshments**

09:30-09:40 **Conference welcome from conference chairs** - Alberto Perez Cedillo, founding partner, Alberto Perez Cedillo Spanish Lawyers and Solicitors, and Kate Mahon, solicitor, Davidson Mahon Solicitors

09:40-10:10 **Keynote speaker** - Richard Frimston, consultant, Russell Cooke

10:10-11:00 **Investing into the UK post-Brexit: looking into the abyss?** - Jo Summers, partner, PWT Advice

11:00-11:20 **Refreshments and networking in exhibition**

11:20-12:10 **Competitive destinations for HNWI - the tax competition landscape in Europe** - Edward Reed, partner, Macfarlanes

12:10-13:10 **Lunch and networking in exhibition**

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14:10-15:10 **Process of European probate succession part 1**

Case Study: Edwardo and Juliet have been married for 25 years and have properties in Spain, France and Italy as well as a property in London, which is their main home. They also have bank accounts in each jurisdiction. Edwardo has a son from a previous relationship who is 30 years old and who is estranged from Edwardo. Edwardo and Juliet have two children together aged 16 and 20. Edwardo recently had a health scare and wants to ensure his estate planning is all in order. In the event of Edwardo's death, he wants to benefit Juliet and on Juliet's death, she benefits her two children. Edwardo's son from his previous relationship is not included.

Topics to cover

- Estate/Tax Planning
- Wills i.e. do they need Wills in each jurisdiction where they have property? What about any forced heirship rules?
- Powers of Attorney in the event of loss of capacity

In the event of both Edwardo and Juliet's deaths

- Process of administering the estates in each jurisdiction
- Duties on executors in the UK when you have foreign assets
- Inheritance Tax issues/ other tax issues to consider
- UK Grant – can it be re-sealed anywhere or will separate "Grants" be needed in each jurisdiction?
- Best practice

Speakers:

- Diane Le Grand de Belleroche, avocat/solicitor, BeFair Avocats
- Alessia Paoletto, partner, Withers Worldwide
- Juan José de Palacio Rodríguez, notario, DP&R Notarios

15:10-15:30 **Refreshments and networking in exhibition**

15:30-16:30 **Process of European probate succession part 2**

Case study: Edwardo's son wants to contest the estate

Topics to cover

- What rights does he have in each jurisdiction?
- What are the procedures involved in each jurisdiction?
- Can this be prevented through better planning etc.?
- Best practice

Speakers:

- Diane Le Grand de Belleroche, avoat/solicitor, BeFair Avocats
- Alessia Paoletto, partner, Withers Worldwide
- Juan José de Palacio Rodríguez, notario, DP&R Notarios

16:30-16:45 **Closing remarks** - Filippo Noseda, partner, Mishcon de Reya

16:45-17:45 **Networking drinks reception**

Regional Seminars: Inheritance and death - a tax update

When: **April/May 2019:**
London (24 April), Birmingham (30 April), Manchester (9 May).
Time: **From 16:15 - 19:25**
Venues: **The Law Society, 113 Chancery Lane, London, WC2A 1PL**
Radisson Blu Birmingham, 12 Holloway Circus, Birmingham, B1 1BT
The University of Law, 2 New York Street, Manchester, M1 4HJ
Cost: **Free for Section members, From £35 + VAT for non-members**

This seminar will highlight recent changes affecting inheritance tax. This one-hour seminar will provide an update on:

- downsizing
- business property relief
- residence nil rate bands
- criminal facilitation of tax avoidance

The programme is currently being reviewed and more details will be released shortly.

The content of this seminar will typically follow the changes from the new budget**.**

Learning outcomes:

- obtain the latest relevant updates on inheritance tax impacting your clients
- understand the implication of recent inheritance tax changes and case judgments and receive practical guidance on how to best advise and support clients

Speaker: Lisa Mark-Bell, director, Freeths LLP

Lisa acts for a range of high net-worth individuals in relation to their estate planning, including advising on the creation and management of trusts, tax planning strategies and wills.

She also deals with the administration of all types of taxable estates, including those with an agricultural or business element, and advises charities in relation to complex tax issues, including advising on Re Benham grossing requirements.

Lisa qualified as a solicitor in 2007, joining Freeths' (then Henmans) private client department in the same year. Lisa is a member of the Society of Trust & Estate Practitioners (STEP) and the Chartered Institute of Taxation (CIOT), having qualified as a chartered tax adviser in 2014.

Private Client Section Annual conference

When: **28 June 2019**
Venue: **Victoria Park Plaza, London**
Cost: **Discounts for Section members**

Equip yourself with latest developments in private client work at our 2019 annual conference. Advanced booking now open.

Designed to cover a range of essential topics, this event will include advice from expert speakers on how to manage your clients' legal affairs in the UK and abroad.

Private Client Section members receive a discount for this event.

Early birds

- Early bird booking fees are available until 28 May 2019

Programme

09:15-0945	**Registration, exhibition and refreshments**
09:45-09:50	**Welcome and introduction**
09:50-10:50	**Capital tax planning** Emma Chamberlain OBE, barrister, Pump Court Tax Chambers
10:50-11:20	**Stephen Lewis, commissioner, Commercial & Common law, Law Commission In conversation with Michael Cross, news editor, Law Society Gazette**
11:20-11:45	**Refreshments, exhibition and networking**
11:45-13:00	**Concurrent workshop session A**
	A1: Elderly client care and the Mental Capacity Act 2005 Helen Clarke, solicitor, Private Client Section Advisory Committee
	A2: Pensions Luke Brooks, partner and chartered financial planner, Smith & Williamson Paul Garwood, partner and chartered financial planner, Smith & Willaimson
	A3: Contentious Probate update Thomas Dumont, barrister, Radcliffe Chambers
	A4: Inheritance tax on business property: how to protect your clients Steven Appleton, partner - head of Private Client - Manchester, Brabners
	A5: Pricing transparency
13:00-14:00	**Lunch**

14:00-14:10	**Update from council member Melinda Giles, partner, Giles Wilson**
14:10-14:20	**Interactive Q&A**
14:25-15:40	**Concurrent workshop session B - repeat of the morning sessions**
15:40-16:00	**Refreshments, exhibition and networking**
16:00-17:00	**Recent developments in Private Client practice** Professor Lesley King, professional development consultant, University of Law
17:00	**Closing remarks**

Private Client Supporters:

Regional Seminars: Recent developments in private client practice

When: **19 Sept Birmingham, 24 Sept 2019 London, 3 Oct Manchester**
Venues: **The Law Society, 113 Chancery Lane, London, WC2A 1PL**
Manchester - venue TBC
Birmingham - venue TBC
Cost: **Free for section members, From £35 + VAT for non-members**

This one-hour seminar will provide a review of current issues in private client practice.

The exact detail of this seminar will be based on recent developments coming from judgments and statues throughout 2019, but is likely to include coverage of:

- the latest inheritance tax developments, particularly in relation to the residence-nil-rate-band and business property relief
- administration of estates issues including income tax, conflict of interests, and the trusts register

Learning outcomes:

- obtain the latest updates on private client case law
- understand the practical implications of private client case law and case judgments
- receive practical guidance on how to best advise and support your clients

Speaker: Professor Lesley King

Professor Lesley King, professional development consultant for the University of Law, is co-author of Wills, Taxation and Administration: A Practical Guide and A Modern Approach to Wills, Administration and Estate Planning

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Private Client Section - Elderly client conference

When: **18 Oct 2019**
Venues: **The Law Society, 113 Chancery Lane, London WC2A 1PL**
Cost: **Discounted for section members**

The Law Society is bringing together speakers that are experts in their fields who have a day-to-day experience of dealing with the issues covered to provide practical advice to solicitors dealing with the unique challenges of elderly clients. This area of law requires many skills in order to provide comprehensive advice to clients and the conference will include opportunities to ask many questions.

Programme to follow

09:30-10:00 **Registration, refreshments and exhibition viewing**

10:00-10:10 **Chairman's welcome**

10:10-11:05 **Continuing healthcare**
A practitioner's guide to continuing healthcare, when to apply for it and how, when you are likely to get it, what is the appeal process and how does it work, what are the deadlines as well as how things have changed in the 20 years from Coughlan case.

11:05-11:50 **Safeguarding**
This session will cover an introduction to safeguarding, including when it is considered and what for, when does safeguarding overrule confidentiality, what are your obligations, what happens at a safeguarding meeting and what outcomes should you look for.

11:50-12:10 **Refreshments and exhibition viewing**

12:10-12:55 **Releasing of documents**
This session will cover what to do when asked to release a document and will include who is your client, what can you release and to whom and when and what you can say to those that ask. It will consider GDPR and client confidentiality against the need to act in your client's best interests

12:55-13:55 **Lunch and exhibition viewing**

13:55-14:45 **Who is your client and anti-money laundering**
This session will cover who is my client when acting for attorneys and deputies and what are your obligations regarding best interests and how do you manage conflicts. Furthermore, it will look at issues with identification – what ID do you need, can you take photos in care homes and how do you deal with someone who has no ID

Speakers: Melinda Giles, partner, Giles Wilson, and Sarah Murphy, partner, Brabners LLP

14:45-15:30 **Welfare deputyship**
What the current position is with regards to welfare applications at the court including applying for general orders v specific orders to include the evidence needed to be successful. It will deal with particular issues regarding transition and give a guide to a property and financial affairs deputy needs to consider. The issue of costs will also be considered.

15:30-15:50 Refreshments and exhibition viewing

15:50-16:35 Deliberate deprivation

This session will cover what it is and when it is an issue from those that do not want a legacy, PI Trust issues and care fees it will also look at what the options are and your responsibilities when asked to make gifts or pay funds to another party.

Speaker: Fiona Heald, partner, Moore Blatch

16:35-16:40 Closing remarks

The conference programme is put together based on the guidance and assistance of members of the Law Society's Private Client Section and is discounted for members of this Section. The programme is subject to change.

Private Client Supporter:

Inclusive webinars for 2019

Section members benefit from free access to four topical webinars per year, access to all previous recordings and 20% discount on other relevant Law Society webinars.
Review the Private Client Section inclusive webinars today

Private Client Section webinar: Managing estates regarding ashes, pets and possessions

When: **25 March 2019**
Cost: **Free for section members, £54 to non-Section members**

Managing the expectations of grieving family members regarding the affairs of a loved one is fraught with difficulty. Ownership, distribution, rights and duties in relation to ashes, pets and possessions are complex areas of law that often require urgent and immediate input for a recent loss.

Knowing what to do, who to turn to, the options available and how you could help a testator prepare in advance, are essential tools in the armoury of the private client, wills, trusts and probate solicitor. This webinar will help you understand and stay up to date with both a broad understanding of the detail in this niche area of probate law. A great go to guide for established practitioners and trainees alike.

This webinar will cover

- determinatives about ashes, pets and possessions in the will,
- important assets that can be lawfully expressed in the will,
- intestacy rules on ashes, pets and possessions and different case scenarios,
- which people have locus, which court should they go to and what powers do they have?

By attending this webinar, you will gain

- detailed practical knowledge of what to include and not to include in a will,
- detailed practical knowledge of what happens to ashes, pets and possessions when there is testacy and/or intestacy,
- an understanding of how to challenge the above outcomes, by whom and where

Speaker: Amy Berry, barrister, Pump Court Chambers

Amy Berry has an excellent reputation across the South Coast for her work with the estates of those that have lost capacity or died, which predominantly focuses on complex trusts, claims to be beneficiaries, insolvency, development, farms, tax, wills, probate and professional negligence. She guides clients through a difficult time by giving accurate yet pragmatic advice with an eye to cost benefit. She is a full member of both ACTAPS and STEP, regularly writes articles and gives seminars and lectures, and is ranked as leading junior (1) for chancery work, Western Circuit, Legal 500.

Webinar: Pensions update - demystifying the current regime (OnDemand)

When: **28 Oct 2018 (OnDemand)**
Cost: **Free for section members, £54 to non-Section members**

This webinar aims to provide you with a greater understanding of the current pension system and, specifically, the latest opportunities and pitfalls when advising private clients.

The past decade has seen regular and often dramatic changes to the simplified pension system that was first introduced in 2006.

Whilst some aspects of the rules give pension savers greater flexibility and control than ever before, there has also been significant tightening in the amount that can be contributed to and accumulated within a registered pension scheme.

This webinar is inclusive to Private Client Section members. Originally broadcast on 26 October 2018, the session covers:

- private pension contributions and the annual allowance
- private pension limits and the lifetime allowance
- the state pension - the new rules
- defined benefit pensions - what's all the fuss about?
- retirement options update - annuities, drawdown, phased retirement and uncrystallised funds pension lump sums (UFPLSs)
- transfer considerations.

By attending this webinar, you will gain:

- an understanding of the key features of the current private and state pension systems
- helpful hints and tips to watch for when advising private clients.

The webinar will also be of interest to those considering their own retirement plans.

Speaker: Luke Brooks, partner, Smith & Williamson

Luke Brooks is a partner at Smith & Williamson who has specialised in providing retirement planning advice for over 15 years. Luke's experience encompasses advising entrepreneurs, partners of accountancy and law firms, investment professionals, sportsmen and women.

He is a Chartered Financial Planner, an associate of the Personal Finance Society and the Chartered Insurance Institute, and is authorised by the FCA to give investment advice. Luke was awarded the London Insurance Institute's Advanced Diploma in Financial Planning prize for achieving the highest score of all candidates in 2008.

Webinar: Court of Protection cases – achieving a fair reward for your valuable work (OnDemand)

When: **4 Sept 2018 (OnDemand)**
Cost: **Free for section members, £54 to non-Section members**

Originally broadcast on 4 September 2018, this webinar looks at how lawyers get paid for work on deputyship (financial and property affairs) cases.

Deputyship cases are subject to an independent assessment by the Senior Court Costs Office. A lack of knowledge of the assessment process and how to maintain / present files can lead to unnecessary reductions.

This webinar will help practitioners to obtain the right level of pay for the very valuable work that they do.

The webinar will cover:

- billing periods
- hourly rates
- Office of the Public Guardian costs guidance
- costs assessment procedure
- top tips.

Speaker: Andrew McAulay, partner, Clarion

Andrew is the highly respected and professional leader of the Clarion costs and litigation funding team. Andrew created the team in 2011 and has successfully grown it to be a nationally recognised service. The team now consists of 15 people and acts for 150 law firms across the UK. It is the biggest in-house legal costs team (with an external offering) in the UK. The team have a specialist Court of Protection division, which prepares circa 2,000 Court of Protection bills each year and acts for 50 per cent of the Court approved Panel Deputies.

Andrew is a qualified costs lawyer and mediator and is a member of the Association of Costs Lawyers (ACL). He is an accredited costs lawyer meaning he is authorised by the Costs Lawyers Standards Board to deliver CPD training. He regularly lectures on costs law and litigation funding at external events and for Leeds City College. He has had many articles published in 'Litigation Funding' (sister publication to the Law Society Gazette) and the ACL journal.

Webinar: Money laundering for private client advisers (OnDemand)

When: **19 July 2018 (OnDemand)**
Cost: **Free for section members, £54 to non-Section members**

Learn what you need to do to keep abreast of new regulations and how to protect your firm from money laundering in our webinar.

The Money Laundering Regulations 2017 and the recent Criminal Finances Act impose new obligations on practitioners and firms – and those involved in private client and tax planning work must devote considerably more time and energy to protect themselves. With money laundering and tax evasion laws burgeoning and greater scrutiny of tax avoidance schemes by HM Revenue & Customs (HMRC), lawyers are facing the increased risk of prosecution and reputational damage.

The webinar will cover:

Statutory requirements and defences which you need understand to avoid financial penalties and possible criminal conviction. In this one-hour webinar Pearl Moses, head of risk and compliance discusses the implications of the recent legislation on private client practitioners including:

- what are the key changes in regulations?
- customer and enhanced due diligence
- sanctions and PEPs
- red flags for private client practitioners
- risk and compliance documentation.

Speaker: Pearl Moses, head of risk and compliance at the Law Society.

Pearl is a seasoned legal professional and a solicitor with over 12 years' experience in private practice, legal publishing and regulatory compliance issues.

Pearl joined the Law Society in 2003 and since then has held a range of regulatory roles including senior technical adviser with a policy formulation, training and adjudication remit.

Webinar: Drafting wills to cover assets in overseas jurisdictions (OnDemand)

When: **1 June 2018 (OnDemand)**
Cost: **Free for section members, £54 to non-Section members**

Whether you want to be able to draft a single will to cover your clients' worldwide assets or whether you need to draft more than one will to cover your clients' assets in the UK or abroad, this webinar will help you to understand the inherent dangers and opportunities.

The webinar will cover:

- formal validity of wills
- essential validity of wills
- executors in common and civil law jurisdictions
- cross-border tax traps
- advantages and disadvantages of drafting

By attending this webinar, you will gain:

- an insight into how and when 'foreign wills' are valid in the UK
- the ability to determine when a UK will is formally valid overseas
- knowledge of how to avoid adverse cross-border tax consequences for your clients
- awareness of when to, and when not to use elections and other choices of law
- confidence to decide when it is appropriate to include your client's foreign assets in a worldwide will
- understanding of the checks required to ensure the essential validity of a will devolving overseas assets

Speaker: Daniel Harris, partner, Stone King

Daniel Harris is a partner and head of Stone King's specialist international and cross-border team. He advises UK and overseas private clients as well as charities and other solicitors, on succession and taxation issues in all jurisdictions of the world.

Ranked in Chambers and Legal 500, Dan is described in the latter as having 'a charm, sincerity and genuine desire to provide the best advise and most proactive service possible within an agreed cost of forecast'.

Member Offer

Inclusive E-newsletter

The Private Client Section has a dedicated e-newsletter for its members. As part of your Section membership, you will receive regular e-newsletters, with recent private client news, selected cases and commentary on developments in the field by Professor Lesley King and Roman Kubiak, partner and head of the Contested Wills, Trusts and Estates team at Hugh James

Inclusive PS Magazine

Our PS magazine focuses on the issues that matter in private client practice through features, commentary and updates from leading practitioners. 'Back to Basics' is a practical feature that deals with one key issue in extensive practical detail.
Here are some examples of our previous editions

November 2018

September 2018

August 2018

May 2018

February 2018

November 2017

September 2017

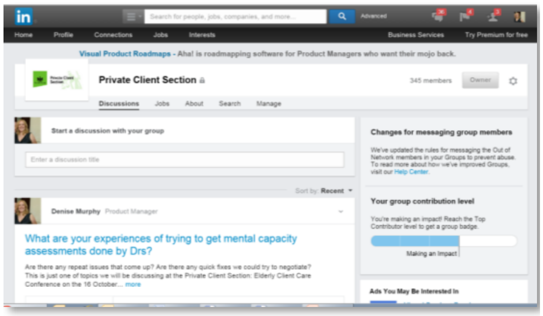
August 2017

May 2017

LinkedIn

The Private Client Section enables members to share news, features, events and other relevant activities in a private environment. Increase your private client legal network and join our LinkedIn group.

To find our LinkedIn group use the link on the Private Client Section web page under About us, or enter the following in your Internet browser https://www.linkedin.com/groups/8320166



Website

The Private Client Section website is a one-stop portal of information for the legal community working in wills, probate, financial and tax planning, trusts, mental capacity and estate administration. It contains practical guidance, news, research and event details, we encourage you to use its search facility to provide quick access to the latest news updates, to search for past articles or practice notes. To access inclusive member only content, simply register and login on our web site www.lawsociety.org.uk/privateclient

If you have any difficulties accessing our events or content please do contact our membership services team Tel:0207 320 5804 or Email: privateclientsection@lawsociety.org.uk

Committee

Thank you to our committee members

This programme of engagement was created in close consultation with the Private Client Section Advisory Committee to ensure it is relevant and timely.

Committee members meet multiple times a year to discuss the key issues facing the private client legal community. The committee advises on how the Law Society can best support its members who work in the fields of wills and probate, financial and tax planning, elderly client, estate administration, mental capacity, trusts, charities, family and relationships, and contentious probate.

The Section is chaired by Fiona Heald, an experienced solicitor working at Moore Blatch in the South, the vice-chair is Kate Mahon, a solicitor and sole practitioner at Davidson Mahon Solicitors in Rugby, Warwickshire. Melinda Giles, a partner at Giles Wilson LLP in Essex, is the Private Client Council member.

The Law Society thanks all of the committee members for their time, commitment and contribution.

Committee Member	Organisation	Role
Alberto Perez Cedillo	Alberto Perez Cedillo Spanish Lawyers & Solicitors	Partner and solicitor
Charlotte Pisuto	Hugh Jones Solicitors	Solicitor
Fiona Heald	Moore Blatch	Partner, head of Court of Protection and Solicitor
Gareth Marland	Berwins Solicitors Limited	Director and Solicitor
Helen Clarke		Solicitor and consultant lecturer
Helen Starkie	Helen Starkie Solicitor	Sole practitioner and solicitor
John Perry	Palmers Solicitors	Partner and solicitor
Kate Mahon	Davidson Mahon Solicitors	Sole practitioner and solicitor
Melinda Giles	Giles Wilson LLP	Partner, solicitor and head of the private wealth team
Sarah Murphy	Brabners LLP	Partner
Simon Leney	Cripps Trust Corporation Ltd	Partner and solicitor
Stuart Adams	Mishcon de Reya	Associate and solicitor