



**St John's**  
CHAMBERS

# Wills & Succession Conference

*Essential for all that deal with  
contentious or non-contentious  
wills and succession issues.*

£40 +  
VAT

1.00pm  
- 4.30pm

Wednesday  
16th November  
2022

Dartington  
Hall  
Devon

CPD: 2.5 hours

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*Wealth Managers*

# Programme

This conference will be essential for all practitioners, whether contentious or non-contentious, who deal with wills and succession issues. The conference will update practitioners on the latest developments in this area as well as offering a practical guide to dealing with such claims in practice.

<b>1.00– 1.25pm</b>	<b>Registration and refreshments</b>
<b>1.25 - 1.30pm</b>	<b>Welcome and introduction</b> Alex Troup, Head of Wills & Trusts, St John's Chambers
<b>1.30 - 2.00pm</b>	<b>Clinical assessment of testamentary capacity: Processes and pitfalls</b> Dr Tracey Ryan-Morgan, Consultant Clinical Neuropsychologist & Clinical Director, Talis Consulting Limited
<b>2.00 - 2.30pm</b>	<b>Will drafting, statutory wills and 1975 Act claims: Top tips and tales from the coal face</b> Samantha Buckthought, Panel Deputy and Partner, will consider a case study involving will drafting and statutory wills. Julian Burrows, Contentious Probate Associate Solicitor, will consider a case study involving a 1975 Act claim by a dependant
<b>2.30 - 3.00 pm</b>	<b>Prosecco &amp; Cream Teas</b>
<b>3.00 - 3.10pm</b>	<b>The importance of will registration and will search – The National Will Register</b> Astrid Bowser, Product Manager, The National Will Register at Advanced
<b>3.10 - 4.10pm</b>	<b>Interactive session</b> Alex Troup, Charlie Newington-Bridges, Georgina Thompson and Annie Sampson will lead an interaction session involving: <ul style="list-style-type: none"><li>• Avoiding contentious probate and 1975 Act claims</li><li>• Dealing with such claims when they do arise</li><li>• <i>Larke v Nugus</i> requests and the updated Law Society Guidance</li><li>• Parties and conflicts of interests</li></ul>
<b>4.10 - 4.30pm</b>	<b>Investing in a complex world</b> Robert Clarke, Senior Investment Manager and Glenn Baker, Business Development Director, Charles Stanley
<b>4.30 - 4.40pm</b>	<b>Q&amp;A session</b>
<b>4.40pm</b>	<b>Drinks &amp; canapes to be served — We hope you can join us!</b>

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# Presenters



**Alex Troup**  
Head of Wills & Trusts,  
Barrister, Call 1998  
St John's Chambers

"Alex marries technical excellence and courtroom experience with a great human touch and the ability to speak to lay clients. He is very robust with his advice and has gravitas."

CHAMBERS UK 2022, CHANCERY

Alex is ranked as the only "star individual" on the Western Circuit in chancery matters by Chambers UK, and is the Head of the Wills & Trust Practice Group at St John's Chambers. His practice includes both advisory and contentious work relating to trusts, wills and the administration of estates, including claims based on proprietary estoppel and under the Inheritance (Provision for Family and Dependents) Act 1975.

Alex has been trained as a mediator with the London School of Mediation and works both as a mediator and as a representative at mediations. He has been consistently recommended as a leading junior in Chambers UK, Legal 500 and Legal Experts.

“ St John's Chambers houses one of the premier Chancery teams on the western circuit, with a collection of 'expert, approachable, and down to earth' barristers who 'offer London expertise at regional rates'. ”

LEGAL 500, 2022  
CHANCERY,  
PROBATE & TAX



**Dr. Tracey Ryan-Morgan**  
Consultant Clinical  
Neuropsychologist

Dr. Tracey Ryan-Morgan is a Consultant Clinical Neuropsychologist, presently Clinical Director of Talis Consulting Limited ([www.talisconsulting.co.uk](http://www.talisconsulting.co.uk)), and an Associate Fellow of the British Psychological Society. Tracey is also Registrar and Chief Supervisor to the Clinical Neuropsychology Qualifications Board for the post-doctoral Qualification in Clinical Neuropsychology (Q.i.C.N.), a Regional Fellow of the Royal Society of Medicine and a Chartered Scientist. She works out of bespoke Consulting Rooms in Carmarthen and at 10, Harley Street, London.

Tracey was the Consultant and Clinical Lead for the Brain Injury Rehabilitation Trust 24 bed unit in Llanelli, Carmarthenshire from October 2013 to January 2017.

Dr. Ryan-Morgan was a founder member of a national Cross-Committee Working Party of the Division of Neuropsychology which has produced a profile of competencies in Clinical Neuropsychology within the context of Statutory Regulation of the profession via the Health Care Professions Council with whom she is Registered.

Tracey is Deputy Chair of the Committee for Training in Clinical Neuropsychology and is experienced in convening and conducting BPS accreditations of Doctoral and post-Doctoral training courses in Clinical and Neuropsychology. She has recently published a commissioned book for Routledge on The Mental Capacity Act (2005) and is an invited reviewer for the journal, Neuropsychological Rehabilitation.

In her NHS practice, Dr. Ryan-Morgan was Head of Specialty for Clinical Neuropsychology and Deputy Head of Clinical Psychology until 2006 when she left to further develop her private practice after 15 years NHS experience. Dr. Ryan-Morgan has previously held an (invited) Honorary position of Consultant Clinical Neuropsychologist with the Hywel Dda Health Board and is presently Locum Consultant Clinical Neuropsychologist with the Swansea Bay University Health Board.

Visit [www.stjohnschambers.co.uk](http://www.stjohnschambers.co.uk) for full profiles



**Charlie Newington-Bridges**  
**Barrister, Call 2011**  
**St John's Chambers**

"Charlie is robust in his approach but deals with clients very well. He is very methodical and gets to grips with cases quickly."

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Charlie undertakes a wide range of commercial and chancery work in litigation, arbitration and mediation. He has experience of substantial, complex and high-value litigation in the High Court and the Court of Appeal. He also has wide experience in the county courts and in injunction applications. His work is often court-based where he is recognised in the directories as 'brilliant, the hardest-working counsel I have seen'. He regularly advises companies, partnerships, charities, trusts, and individuals. He worked in the investment banking industry for 15 years before coming to the bar and so has a particular interest and strength in company, investment, valuation and general financial services related matters.



**Annie Sampson**  
**Barrister, Call 2015**  
**St John's Chambers**

Annie's experience encompasses a broad range of wills and trusts work, including both contentious and non-contentious matters. Annie has particular experience of advising in respect of the construction of wills and challenges to their validity; 1975 Act claims, including advising in respect of settlement where there are minor beneficiaries; applications for the removal of executors and trustees; trusts of land; and professional negligence arising in context of wills and trusts work, including claims by disappointed beneficiaries.

Recent cases include:

- Successfully proving an unsigned copy of a will.
- Obtaining permission to appeal a case management decision in the context of high-profile forfeiture claim.
- Advising trustees how to resolve an apparent stalemate between them and the beneficiary of a life interest.
- The mediation of a 1975 Act claim in respect of a multi-million pound estate.
- Advising in respect of the administration of a will trust where the fund was to be divided equally, but each of the beneficiaries obtained a vested interest at a different point in time.
- Advising executors where the estate principally comprised the deceased's unregistered property, the title deeds to which could not be located.

# Presenters



**Georgina Thompson**  
**Barrister, Call 2017**  
**St John's Chambers**

Georgina is a commercial and chancery practitioner and a qualified mediator. She accepts instructions in all of the main areas of commercial and chancery law. Her main areas of expertise lie in commercial litigation, insolvency matters and contentious probate disputes.

Georgina joined chambers in October 2019 following the successful completion of her pupillage. Her pupil supervisors were Alex Troup and John Dickinson. During her pupillage she gained experience in all aspects of commercial and chancery law.

Since taking tenancy in October 2019, Georgina has appeared in the High Court on matters varying from construction adjudication and enforcement in the Technology and Construction Courts, to contentious probate disputes in the Business and Property Courts. Georgina also regularly appears in the County Court dealing with both trials and interim procedural hearings; such as applications to strike out, injunctions and applications to set aside default judgments. Georgina has also developed a busy paper practice advising on matters relating to company and contract law, sale of goods issues and insolvency proceedings.

Alongside her court practice, Georgina has attended a range of mediations acting on behalf of clients; such as beneficiaries in 1975 Act claims, companies involved in sale of goods and supply of services disputes, and trustees in complex, multi-party trusts and probate litigation. Georgina welcomes instructions to attend meditations concerning commercial and chancery disputes.

“ St John's Chambers is highly esteemed on the Western Circuit for its expertise in traditional and commercial chancery work. ‘The set has excellent barristers at all levels,’ says one source. The chambers assists with contentious will and trusts disputes, property disputes and Court of Protection matters, as well as professional negligence claims. It is also well known for its expertise on high-value agricultural land disputes. Sources say the set is ‘very capable with a specialist, expert team of barristers who are all helpful and skilled and keep their knowledge well updated.’ ”

To find out more about us visit:

[www.stjohnschambers.co.uk](http://www.stjohnschambers.co.uk)

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 St John's Chambers

# Presenters



**Samantha Buckthought**  
Panel Deputy and Partner,  
Wolferstans

Samantha is a Senior Partner with responsibility for private client work. She specialises in complex, high value and taxable estate administration, complex wills and trust work. She became a partner in 2004 and Head of the Wills and Trust department in 2007, a post which she held until 2018 when she became a Senior Partner. She is a member of the Law Society Private Client Section, the Institute of Legacy Management and is a Panel Deputy for the Court of Protection, only one of a handful in the country recognised for her skill and expertise in dealing with elderly and vulnerable clients.



**Julian Burrows**  
Contentious Probate  
Associate Solicitor,  
Wolferstans

Julian is an Associate in the Wolferstans Disputes & Litigation team who works predominantly in the field of contentious probate. Julian obtained an LLB law degree at the University of Leeds in 1999 before obtaining an LLM Masters in Law in 2002 from the University of New South Wales in Sydney, Australia. Julian was admitted in 2004 in New South Wales and worked as a civil litigator at a medium sized commercial and insurance firm in Sydney for 15 years before returning to his native Plymouth in 2014. Julian is an Associate Member of ACTAPS.



**Astrid Bowser,**  
Product Manager,  
The National Will Register  
at Advanced

Since 2010, Astrid has been an integral part of shaping The National Will Register. The National Will Register enables law firms to ensure their client's Wills can be quickly and confidentially traced with Will Registration back to the law firm and an estate is correctly distributed in line with a Testator's latest valid Will with a Certainty Will Search. Working closely with law firms to register their Will banks and newly written Wills, the team at The National Will Register have ensured 9.4 million Wills are now within The National Will Register.

Visit [www.wolferstans.com](http://www.wolferstans.com) for more information