



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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**CHARLES
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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.

1.00– 1.25pm	Registration and refreshments
1.25 - 1.30pm	Welcome and introduction Alex Troup, Head of Wills & Trusts, St John's Chambers
1.30 - 2.00pm	Clinical assessment of testamentary capacity: Processes and pitfalls Dr Tracey Ryan-Morgan, Consultant Clinical Neuropsychologist & Clinical Director, Talis Consulting Limited
2.00 - 2.30pm	Proprietary estoppel – quantifying the equity in light of the Supreme Court's judgment in <i>Guest v Guest</i> Christopher Jones, Head of Commercial & Chancery, St John's Chambers
2.30 - 3.00 pm	Prosecco & Cream Teas
3.00 - 3.10pm	The importance of will registration and will search – The National Will Register Astrid Bowser, Product Manager, The National Will Register at Advanced
3.10 - 4.10pm	Interactive session Alex Troup, Charlie Newington-Bridges, Georgina Thompson and Annie Sampson will lead an interaction session involving: <ul style="list-style-type: none">• Avoiding contentious probate and 1975 Act claims• Dealing with such claims when they do arise• <i>Larke v Nugus</i> requests and the updated Law Society Guidance• Parties and conflicts of interests
4.10 - 4.30pm	Investing in a complex world Robert Clarke, Senior Investment Manager and Glenn Baker, Business Development Director, Charles Stanley
4.30 - 4.40pm	Q&A session
4.40pm	Drinks & canapes to be served — We hope you can join us!

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Presenters



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

"Alex is extremely astute and robust. He commands respect in the courtroom."

LEGAL 500, 2023
(CHANCERY, PROBATE & TAX)

Alex is ranked as the only 'star individual' on the Western Circuit in chancery matters by Chambers UK and is Head of our Wills & Trusts team.

He has recently been identified as the only 'star ranked' leading professional adviser to the Private Wealth market (outside London), where he is featured in the High Net Worth Guide 2022.

Alex was also shortlisted for 'Junior of the Year' in the regional category of The Legal 500 UK Awards 2020. He is well known and highly praised for his ability to handle complex disputes concerning wills and trusts, and he is also described by a commentator as a 'phenomenal mediator.' 'Alex is highly knowledgeable and able to deal with highly complex factual and legal disputes, and disputes concerning intricate matters of law and procedure.

Alex was instructed to act for the successful second and third defendants in the High Court in the noteworthy case of *Hughes v Pritchard and others* [2021] EWHC 1580 (Ch).



Christopher Jones,
Head of Commercial &
Chancery, Call 2004
St John's Chambers

"An excellent trial advocate who is unafraid to fight his corner."

LEGAL 500, 2023
(CHANCERY, PROBATE & TAX)

Christopher is a wills and trusts barrister, regularly advising in cases involving the division of assets between cohabitants, disputed wills and the administration of trusts and estates. He is also a qualified mediator and can be instructed to mediate private client disputes.

He is consistently recommended as a leading junior in Chambers UK and Legal 500.

Christopher was led by Leslie Blohm QC, when they successfully represented Lucy Habberfield before the Court of Appeal. Lucy had worked on her parents' farm, relying on promises over many years, for low wages and long hours. Following a two day hearing, the Court of Appeal rejected her mother's appeal, and upheld the judgment of Mr Justice Birss who had awarded Lucy £1,170,000. The case considers the tension between awarding a remedy which fulfils the expectation, and a remedy which compensates the detriment suffered.



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

"Charlie is great with clients, pragmatic in his approach and advice, and prompt with production of advice."

CHAMBER UK, 2023
CHANCERY

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.

Presenters



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.



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

Presenters



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), 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.

Dr. Ryan-Morgan is regularly asked to speak at National conferences and has made presentations to the Royal College of Psychiatrists as well as appearing alongside the Master of the Court of Protection as a guest speaker.



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.

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www.stjohnschambers.co.uk

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