



St John's
CHAMBERS

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Cost £40 + VAT
CPD : 2.5 hours



Wills & Succession Conference

Thursday, 10th February 2022

1.00 pm - 4.20 pm

Dartington Hall, Totnes, TQ9 6EL

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Book your place by visiting:
www.stjohnschambers.co.uk/events-and-seminars

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	Will drafting, statutory wills and 1975 Act claims: Top tips and tales from the coal face 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
2.30 - 3.00 pm	Prosecco & Cream Teas
3.00 - 4.00pm	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• Larke v. Nugus requests and the updated Law Society Guidance• Parties and conflicts of interests•
4.00 - 4.20pm	Investing in a complex world Robert Clarke, Senior Investment Manager and Glenn Baker, Business Development Director, Charles Stanley
4.20pm	Drinks & canapes to be served — We hope you can join us!

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Presenters



Alex Troup

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

"Alex is probably the best chancery junior practising in the South West in inheritance and trust disputes. He is approachable, great with clients, measured in his advice and convincing on his feet. Technically excellent, a commanding presence in the courtroom, and works hard to build a rapport and relationship with clients."

**CHAMBERS UK, 2021
CHANCERY**

Alex is ranked as the only "star individual" on the Western Circuit in chancery matters by Chambers UK, and is the Head of 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 consistently recommended as a leading junior in Chambers UK, Legal 500 and Legal Experts. In previous editions Alex has been described as "highly skilled and approachable, and has good legal and people skills", a "formidable advocate", a "star of probates", "among the most skillful barristers" and as having "a real commercial brain".

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.

“ St John's Chambers is 'a standout chambers for chancery work.' The barristers are held in extremely high regard on the Western Circuit for both their traditional and commercial chancery expertise.”

**LEGAL 500 2020
COMMERCIAL,
BANKING,
INSOLVENCY AND
CHANCERY LAW**



**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.

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.

Presenters



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

"Charlie is particularly well regarded for his commercial nous and sector expertise in financial services, which is supported by 15 years' prior experience as an investment banker. 'He's very user-friendly and commercial, and quickly becomes part of the team. He's particularly good on unfair prejudice petitions and shareholder disputes.' 'He's very, very good on his feet.' "

CHAMBERS UK, 2020
COMMERCIAL DISPUTE RESOLUTION

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.

Charlie is a traditional chancery barrister with a specialism in Inheritance Act 1975 claims and experience with high-value estates and complex wills.



Georgina Thompson
Barrister, Call 2017
St John's Chambers

Georgina is a member of the Commercial and Chancery team. She joined Chambers in October 2019 following successful completion of her pupillage under the supervision of Alex Troup and John Dickinson.

Georgina is currently building a broad practice; undertaking work in all areas of law within the Commercial and Chancery team.

During her pupillage and since joining Chambers as a tenant, Georgina has acted in, and advised upon, a variety of matters including insolvency proceedings, such as bankruptcy and winding up petitions; sale of goods and supply of services disputes; subsidence and other property damage claims and residential possession proceedings. She has also made and resisted various procedural applications. From a chancery perspective, Georgina has been instructed on claims under the Inheritance (Provision for Family Dependents) Act 1975, breach of trust claims and applications to remove executors.

To find out more about us visit:

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 St John's Chambers

Presenters



Annie Sampson
Barrister, Call 2015
St John's Chambers

Annie has recently joined chambers following the successful completion of a specialist pupillage within the Commercial and Chancery Practice Group.

She is now building on that experience to develop a broad commercial and chancery practice.

Annie's experience includes commercial disputes, including applications for interim relief; partnership disputes, in particular in an agricultural context; residential and commercial possession proceedings; personal insolvency; the construction and validity of wills; and 1975 Act claims. For further details of Annie's commercial and chancery experience, please click on the headings in the Areas of Expertise section.

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.
- Advising potential claimants how best to proceed when presented with a variety of options to obtain a (greater) benefit from an estate, including whether to challenge the validity of the will or to claim under the Inheritance (Provision for Family and Dependants) Act 1975 or pursue the will drafter for professional negligence.
- 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.

About the team:

Our Wills & Trusts team are recognised as leaders in their field in the South West. They advise and represent clients in a broad range of cases, with a particular strength in complex contentious trusts and inheritance disputes.

We were shortlisted for "Chambers of the Year" at the Society of Trust and Estate Practitioners (STEP) Awards in 2017, and again in 2018.

We pride ourselves in offering a user-friendly legal service, especially for those suffering a bereavement which is compounded by a family dispute. Our barristers have a reputation for handling these types of cases with sensitivity and tact as well as being robust advocates.