

ThoughtLeaders  Private Client x 

# PRIVATE CLIENT SUMMER SCHOOL: THE ULTIMATE INSIDER'S GUIDE 2022

*SUMMARY*



*24 – 26 AUGUST 2023*  
*DOWNING COLLEGE, CAMBRIDGE*



## Class of 2022

### Private Client Summer School: The Ultimate Insider's Guide



Authored by: Alastair Ward-Booth - Maurice Turnor Gardner

The Private Client Summer School was held at Downing College Cambridge this year, with delegates arriving on the evening of 24 August. Downing College was an appropriate venue for the conference, having been founded in 1800 with a particular focus on the study of Law and Medicine – and retains a strong legal reputation. Delegates were able to enjoy the beautiful setting of the main quadrangle as they arrived to check into their accommodation on Wednesday afternoon.



The first opportunity for delegates to meet one another was the meet and greet at the Town & Gown pub in central Cambridge. This provided a welcome chance for delegates to mingle over drinks and food ahead of the conference starting.

Thursday started with breakfast in the William Wilkins-designed dining hall at Downing College. The first talk of the day was delivered by Ruth Hughes of 5 Stone Buildings who covered some inheritance tax and capital gains tax basics.

***This provided a valuable refresher on the foundations of inheritance tax and capital gains tax for attendees – confirming that private client lawyers will always have to deal with life's certainties: death and taxes.***

A highlight of the morning sessions included David Kilshaw of Rothschild & Co who provided an overview of

residence and domicile from a wealth planner's perspective. It was useful to have a practical focus on the issues faced by private clients if becoming UK resident and the need to evidence intentions so as to preserve non-domiciled status for clients. The key message was that it is important for clients to plan ahead of becoming UK resident to avoid any potential pitfalls.

The delegates then broke for lunch giving everyone a chance to discuss the morning's talks and get to know each other over the fantastic food provided by the Downing College conference team.

After lunch Michael Mylonas KC and Lorraine Jeffrey provided an overview of capacity – and emphasised how time is critical when it comes to capacity assessments. Their advice included outlining the pitfalls to avoid when assessing capacity and the practicalities of dealing with urgent capacity hearings. Nick Holland (McDermott, Will & Emery) then provided a jurisdictional tour of various offshore jurisdictions, leaving delegates ever so slightly tempted by a possible relocation to the sunny beaches of Bermuda or the Cayman Islands.





Rosalind Hetherington (Maurice Turnor Gardner) gave a useful overview of the interplay between advisory work and disputes work. In particular, her insights on the cross over between the two areas and how advisory matters can creep towards being more litigious was particularly useful to delegates to better equip them to spot the signs of an advisory matter becoming potentially contentious and how to handle such situations.



Richard Manyon (Payne Hicks Beach) and Gemma Willingham (Baker Mackenzie) then provided some practical advice for attendees on how to manage client relationships and build their network successfully.

The delegates then headed down to the river Cam to go punting, dividing up into groups of six for each punt.

***After several rocky starts the delegates made their way down the river, with competitive streaks coming to the fore but miraculously no one fell into the river, and so everyone returned to Downing College in one piece and dry.***

The networking continued over a barbeque with Pimm's and champagne as delegates discussed the day's events in the wonderful setting of the West Lodge Garden. There followed an after party at Novi and delegates enjoyed the chance to relax after an intense day of talks.

After a restorative breakfast (especially for those who had made it to Lola Lo's post-Novi), Friday morning began with some 'cooking' with chefs Mark Hubbard (New Square Chambers) and Simon Hurry (Collas Crill). They outlined their recipes for success when dealing with trust disputes and insolvency, which provided contentious and non-contentious practitioners alike a useful overview of what to consider when dealing with insolvent trustees or trusts – including key differences between various jurisdictions and their approaches to insolvency.

Candy Stockton (Irwin Mitchell) then provided a useful overview of 1975 Act claims and probate disputes. Of particular interest was the case of *Reeves v Drew* where a solicitor had charged just £140 to draft a Will for a client with an estate worth nearly £100 million.

The case centred around an attempt by the testator's daughter to disinherit her brother. The testator was illiterate, and the solicitor drafting the Will made several mistakes and later provided unreliable evidence to the court surrounding the preparation of the Will and its execution. The solicitor sought to argue that he had provided a 'Primark' service because the client had paid such a small fee, but unsurprisingly this argument held little sway with the Court. Candy's talk gave a useful overview of the factors that should be considered when involved in drafting Wills for clients – particularly where there is no pre-existing relationship with them.

After a coffee break Joe Donohoe (ARC) spoke from the perspective of a trustee, which was a useful insight to those solicitors present as to how trustees have to react to contentious and non-contentious situations. Nicholas Harries (Macfarlanes) then provided an update regarding incoming changes to charities law made by the Charities Act 2022 which come into effect from Autumn 2022.

Building on Thursday's presentation regarding ESG and investing, Nicholas also touched upon the *Butler-Sloss & ors v Charity Commission* case which addressed the question of whether trustees can accept lower investment returns in exchange for ESG considerations, and the balancing act that now exists for trustees between financial impact and potential reputational damage.





After lunch, delegates were treated to an accountant's view of fraud and insolvency by Hannah Davie and Ami Sweeney of Grant Thornton. They noted the increase in registered company insolvencies since the coronavirus pandemic and the possible 'red flags' that solicitors and other advisers should be on the lookout for when providing advice.

Richard Wilson KC gave a useful summary of privilege and how it can help (and hinder) advice, and provided some key points for lawyers to be aware of when advising clients. Esmond Brown (Appleby) then provided an overview of firewall legislation which various offshore jurisdictions use to insulate trusts established under domestic law from attacks from forced heirs of a settlor of those claiming entitlement under a community property regime.

Alex Carruthers then provided an overview of what private client lawyers need to know about family law. Covering topics including asset protection, Alex provided a basic summary of English family law but also described how clients can seek to achieve asset protection in a divorce context and how English courts can seek to make financial provision taking into account trust assets in certain circumstances.

Simon Goldring (Maurice Turnor Gardner) then gave the last talk of the conference regarding business development in the private client world. Simon provided a useful insight into



how junior practitioners should look to build their profiles covering; strategy, investment and planning. Delegates were urged to consider what business development activity suited them most and what they enjoyed doing and focus on those areas to successfully develop their careers and eventually build their practices.

Delegates then mingled for the final time in the Howard Theatre over the remaining tea and coffee before heading to cars, trains and planes to return home after a packed and interesting conference. Delegates had travelled from overseas jurisdictions from the Channel Islands to Switzerland and it provided a unique opportunity for

junior practitioners to meet one another in a relaxed environment.

The Private Client Summer School provided an invaluable opportunity for attendees to meet their contemporaries from across the private client world and hear interesting talks from some leading figures in the private client world.

***Downing College was a fantastic venue for the conference, and I can heartily recommend the 2023 summer school to future attendees.***

The conference allowed delegates to make new contacts through the networking sessions and downtime, but also allows delegates to keep up to date with key legal developments and hear from some engaging speakers.



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Sophia Rogers  
Barrister  
Radcliffe Chambers  
Chair

*“ It was a pleasure to chair this year’s Private Client Summer School. It is such a fantastic conference, and this year did not disappoint! There is always such engaging content, brilliant and experienced speakers and the welcoming atmosphere is perfect for networking and building relationships. Can’t wait for next year! ”*

*“ The Private Client Summer School is a truly unique event. It offers introductory training on the complete suite of knowledge and skills used by Private Client practitioners every day.*

*Most importantly though, it is a welcoming and inclusive environment, with fantastic opportunities to grow professional networks.*

*I was delighted this year to see record breaking delegate numbers - the event has become firmly embedded in the early stage PQE training programmes of so many top tier private client firms. ”*



Ben Havard  
Partner  
Collas Crill  
Chair



Chris Moorcroft  
Partner  
Harbottle & Lewis  
Chair

*“ It’s great to be here, I mean honestly it’s the best conference on the circuit, it’s so much fun, there’s so much great content here for junior lawyers, accountants, trustees, other professionals in the private client arena, it really is fantastic so loving it here. ”*

*“ I do lots of talks in lots of different venues and the theatre is brilliant, there’s just a different feeling being there giving the talks, so I think it’s a great venue, and its an opportunity for the kids to get a lot of experience chatting to people like us, asking questions they might feel a bit embarrassed about asking, and also making contacts with people they can approach for advice in the future. The more you know the better it is going to be, and the better you can represent your clients. ”*



Michael Mylonas KC  
Barrister  
Serjeants’ Inn





James Sheedy  
Baker & Partners

*“ It’s really, really nice to be back in Downing, it’s a great venue and very grateful to be invited back. I think it is really important for junior practitioners if they want to build their practice, build their skills, build networks with their contemporaries in different firms and different practice areas, to come along. ”*

*“ It’s an amazing setting, we are in beautiful surroundings with some wonderful colleagues. We’ve just been punting down the River Cam, you can’t do that in London and its just a really nice, relaxed atmosphere but set up with amazing facilities to give everyone everything you need in one small space.*

*The whole ethos for ConTrA when it was founded in 2015 is about giving young practitioners the platform, and giving them that platform so that they can grow through their careers. TL4 and ConTrA running this Summer School together, it’s effectively the ethos embodied in an event. ”*



Simon Goldring  
Partner  
Maurice Turnor  
Gardner and ConTrA

Watch PRIVATE CLIENT Summer School:  
The Ultimate Insider’s Guide Highlights video



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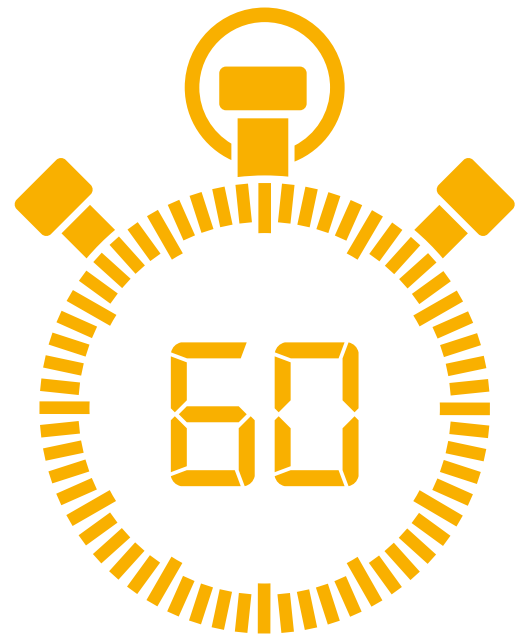
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# 60-SECONDS WITH:

## SOPHIA MOUSTRAS ASSOCIATE COLLAS CRILL



**Q** What is your key area of practice?

**A** I am an Associate in the International Private Client and Trusts team at Collas Crill. My day to day work mainly consists of advising the parties to the trust throughout its lifecycle including the retirement and appointment of new trustees, distributions, restructuring queries and semi-contentious trust disputes such as mistake and rectification applications.

**Q** What are you most going to focus on in the next 12 months?

**A** I started my legal journey with Collas Crill in 2019 as a Paralegal and now I am focusing on transitioning from Trainee to Associate – as a Trainee I was afforded the opportunity to learn and develop my know-how and now it is all about putting that learning into practice. At Collas Crill, associates are placed into two person offices with partners so upon qualifying I now share an office with the head of our department which continues to be a great learning opportunity and I hope to absorb as much as possible over the coming year.

**Q** What do you see as the biggest upcoming challenge you face as a practitioner?

**A** Trying to maintain a successful work-life balance. In Jersey, we are fortunate that there is no real commute, such that even if I do need to work late, I can be home 10 minutes later.

**Q** What is one of your greatest work-related achievements?

**A** Qualifying as a solicitor last month has definitely been my greatest work and personal achievement so far. It has taken seven years and three locations – taking the leap to leave home in Cyprus to move to Liverpool (for university) then to London (for the LPC) and finally back to my roots in Jersey (for my training contract) but I have finally made it out the other side and am extremely grateful for the opportunities that I have been given.

**Q** Why did you choose to attend Private Client Summer School and what did you achieve by attending?

**A** I attended the Summer School as I was keen to continue to broaden my knowledge. Presentations on topics such as 'how to win and lose a client in 10 days' and 'what are the ingredients for an insolvent trust?' don't ordinarily come up in day to day discussions, so I found them really interesting and helpful to expand my commercial and private client awareness and it was also great to have the opportunity to hear the views of the industry experts first hand.

I was also able to meet so many of my contemporaries in the field and expand my network and I walked away with a sense of private client advisor unity (which doesn't sound that cool but trust me, it is).

**Q** What was your key takeaway from any of the sessions at Private Client Summer School?

**A** The difference in approach that is required when you are acting for a trustee, a beneficiary, a settlor or third party. Understanding a client's objectives is key to ensure you meet their expectations.

**Q** What would you say to people thinking of attending one of our summer schools in the future?

**A** Go for it! I wholeheartedly recommend it and I am really looking forward to the next one. If the content and networking aspects do not satisfy your requirements - there was a Pimm's and champagne reception followed by a BBQ – what's not to love!

**Q** What do you see as the most significant trend in your practice in a year's time?

**A** I think sustainable investment is a key trend and hopefully will continue to become even more prevalent with the worldwide recognition of the critical need to become more environmentally conscious in everything we do.

**Q** What personality trait do you most attribute to your success?

**A** Reliability with a sprinkle of self-belief.

**Q** Who is your biggest role model in the industry?

**A** My dad. He qualified as a barrister in 1997 and is the reason I pursued a career in law. He is testimony that not all lawyers are in suits, some are on windsurfing boards in the middle of the Mediterranean sea. He treats everyone with respect and kindness – a trait I wish to emulate.

**Q** What does the perfect weekend look like?

**A** Waking up at my family home in Cyprus and then proceeding to spend the whole day on the beach, preferably with my dog Loulou who is a 'Cyprus Poodle'. She is 15 years old now (I think it's the souvla that keeps her going!), so every moment with her is precious.

**Q** What is something you think everyone should do at least once in their lives?

**A** Move to a new location not knowing anyone. I think getting out of your comfort zone every once in a while is imperative for growth.

**Q** What is a book you think everyone should read and why?

**A** Sapiens – A brief history of humankind - it serves as a reminder that on busy days when it feels like it's the 'end of the world' it truly isn't and life goes on, as it always has done.

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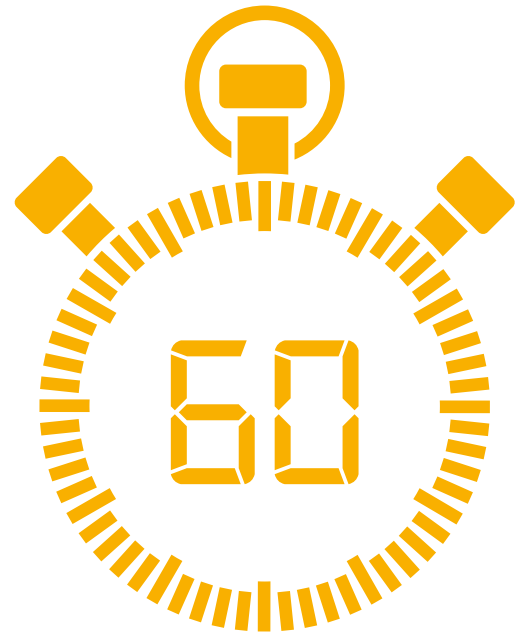


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# 60-SECONDS WITH:

## ELEANOR DAVIES SENIOR ASSOCIATE BAKER & PARTNERS



**Q** What is your key area of practice?

**A** Trusts and commercial contentious work, although you see a bit of everything in Jersey!

**Q** What are you most going to focus on in the next 12 months?

**A** Developing my advocacy skills. I was sworn in as a Jersey advocate last December and I'm keen to put the skills I have learnt from our advocates at Baker & Partners into practice.

**Q** What do you see as the biggest upcoming challenge you face as a practitioner?

**A** Guiding my clients through an increasingly process-driven and attritional litigation landscape. It's easy to lose sight of what a case is about when you are in the trenches of discovery or dealing with hundreds of pages of pleadings.

**Q** What is one of your greatest work-related achievements?

**A** Successfully partnering with another firm to resolve a high-value historic issue for a trustee client. We combined our expertise to solve a very tricky problem in a way that kept everyone happy: the ultimate goal for a private client practitioner.

**Q** Why did you choose to attend Private Client Summer School and what did you achieve by attending?

**A** Quite simply: rave reviews from previous attendees! They were right: it's the perfect combination of networking and learning.

**Q** What was your key takeaway from any of the sessions at Private Client Summer School?

**A** I found the 'soft skills' sessions the most interesting. Simon Goldring's session on networking and finding an approach that works for you really chimed with me, as someone who loves writing a good article but isn't the wildest of party animals!

**Q** What would you say to people thinking of attending one of our summer schools in the future?

**A** Do it!

**Q** What do you see as the most significant trend in your practice in a year's time?

**A** Probably the fall-out from the Russia sanctions, as the offshore world shifts from advising on sanctions issues to dealing with decisions made in a hurry which are now proving problematic.

**Q** What personality trait do you most attribute to your success?

**A** Keeping calm under pressure. It's sometimes more appearance than reality, but it helps to be able to reassure clients and colleagues that, as one of my Russian teachers used to say, "it is possible to live!"

**Q** Who is your biggest role model in the industry?

**A** I have two, both former colleagues at Ogier in Jersey. Katherine Neal for her commercial, problem-solving focused private client advice and pragmatism. And Damian Evans for his excellent

advocacy, good nature and universal reputation as an honest bloke.

**Q** What does the perfect weekend look like?

**A** My husband and I are renovating a Victorian house, so the perfect weekend would involve some successful antiques hunting and finishing decorating a room! And time with friends: brunch at one of Jersey's many cafés or dinner at home.

**Q** What is something you think everyone should do at least once in their lives?

**A** Live abroad. I have been luckily enough to spend chunks of time in Russia and France and have benefited hugely from the different perspectives both countries gave me.

**Q** What is a book you think everyone should read and why?

**A** Depending on your appreciation of absurdity, *The Master and Margarita* or *The White Guard*, both by Mikhail Bulgakov. The former is an enjoyable, satirical caper through 1930s Moscow featuring a giant cat demon, and the latter is a beautifully atmospheric semi-autobiographical tale of a family trying to survive the chaos of Kiev after the Russian Revolution.

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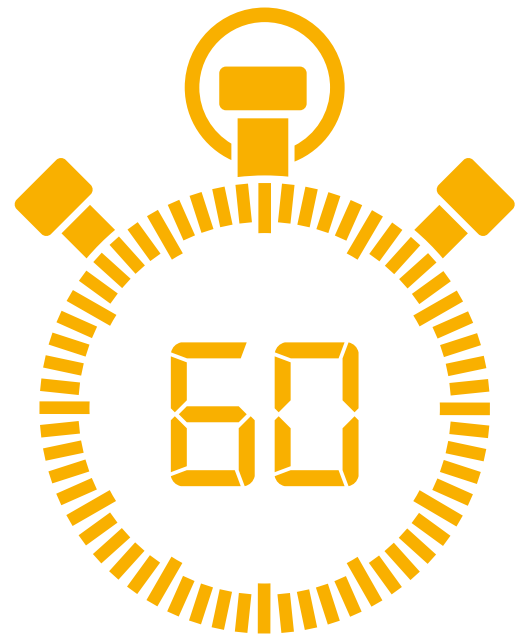
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# 60-SECONDS WITH:

## JENNIFER DAVIES SOLICITOR IRWIN MITCHELL



### Q What is your key area of practice?

A A mix of estate planning and estate administration; my work includes both domestic and international aspects

### Q What are you most going to focus on in the next 12 months?

A A key focus of mine over the next year is to progress my STEP studies, work towards becoming a full STEP member, known as Trust and Estate Practitioner ("TEP"), and have the internally recognised qualification in this field. I should be about ¾ of the way through the qualification in 12 months' time.

### Q What is one of your greatest work-related achievements?

A Successfully presenting a training course to a number of other offices (within my firm) only a few months post-qualification, with 60+ attendees explaining the work we do and how we can help their clients. This may not be a huge achievement to many, but the thought of public speaking to such a large audience, was quite daunting at such an early stage of my career.

### Q Why did you choose to attend Private Client Summer School and what did you achieve by attending?

A The agenda looked great, especially for junior solicitors. The mix of contentious and non-contentious sessions was invaluable. Understanding both sides of the coin and having a solid awareness of the issues that can arise in this area is essential for being a good private client solicitor; the summer school helped to better recognise potential issues.

### Q What was your key takeaway from any of the sessions at Private Client Summer School?

A BD in a private client world doesn't have to be scary! Pre-covid, I had been trying

to focus on attending more networking and BD events to get more comfortable with them. Covid obviously halted this progress slightly, but Simon Goldring's talk which closed the summer school was brilliant.

### Q What would you say to people thinking of attending one of our summer schools in the future?

A I would say to do it. It was a great opportunity to network with peers in other firms (including others from my own firm, from other offices!) in a relaxed setting. As it's held over several days, it relieves the pressure of feeling like you need to speak to everyone at an event which is otherwise held over an hour or two in the evening. It's also a great way to highlights on a huge number of

### Q What do you see as the most significant trend in your practice in a year's time?

A I think that the younger generation will seek estate planning advice at a much earlier stage in their lives. IHT receipts for the tax year to date are £2.9 billion, £0.3 billion higher than in the same period last year, according to HMRC. This is largely due to the increased value of estates as a result of residential property values continuing to soar. Residential property makes up the largest share of most estates and rising house prices will catch more and more people into the IHT remit as a result. Both the nil rate band and residence nil rate band are frozen until at least April 2026 so we can expect to see IHT receipts continue to rise. I therefore think that estate planning will be crucial for asset and wealth protection if these property trends continue.

### Q What personality trait do you most attribute to your success?

A Aside from the usual given traits (communication, analysis skills etc.), I think my people skills have helped my success. Lawyers work with people, on behalf of people, and the decisions that

are made affect people's personal lives. Private client practice is a particular area of law that requires good people skills. Many, but of course not all, of our clients are elderly or experiencing a recent bereavement. Lawyers in this field must be personable, persuasive and able to read others. This impacts everything from the way we approach our files and deal with our clients.

### Q What does the perfect weekend look like?

A I enjoy starting the weekend with a spin class and a walk along the seafront (if the sun is out!) with my dog and family. I like slower evenings relaxing at home with a takeaway and movie. Depending on how the week has gone, an Amaretto Sour on Saturday evening wouldn't go amiss...

### Q What is something you think everyone should do at least once in their lives?

A Do something that pushes you out of your comfort zone, whatever that means to you. This could be anything from going to the cinema or a restaurant on your own to skydiving or mastering a new skill. Trying new things helps break away from routine and tick something off of the bucket.

### Q What is a book you think everyone should read and why?

A This is Going to Hurt: Secret Diaries of a Junior Doctor by Adam Kay. This is a great read for those short on time. An incredible insight into the life of a doctor. Adam Kay makes it genuinely laugh out loud funny, but there's pain at the heart of this story. The unimaginable pressure these doctors are put through is truly awful. It's a real eye opener. His funny takes on situations will have you laughing so hard you'll cry. Definitely worth a read.

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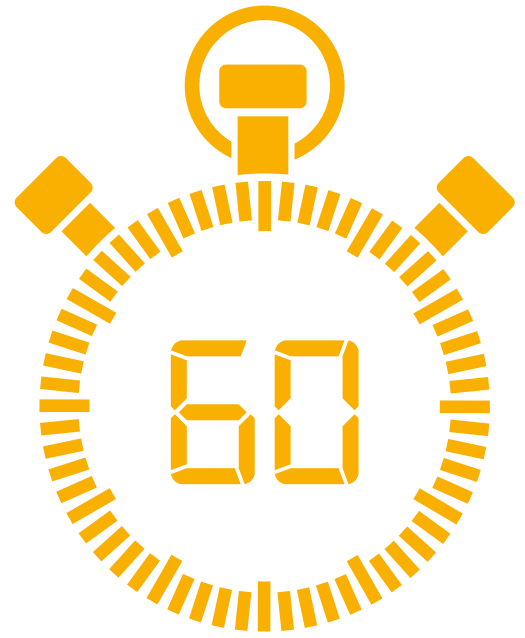
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# 60-SECONDS WITH:

## GEORGIA SUTTON ASSOCIATE CHARLES RUSSELL SPEECHLYS



**Q** What is your key area of practice?

**A** Trust and inheritance disputes

**Q** What are you most going to focus on in the next 12 months?

**A** I would say continuing to provide the best advice to my clients. One of the ways I intend to do this is by staying alive to changes in the market (that may affect my clients now, and in the future) and to keep building upon my knowledge base.

**Q** What do you see as the biggest upcoming challenge you face as a practitioner?

**A** I think learning how to be a good mentor. The hybrid working structure now comes with an array of new challenges. I feel that by adapting to this new environment, I will be able to become a better mentor by understanding how best to connect and communicate with the juniors in my team.

**Q** What is one of your greatest work-related achievements?

**A** Although I am one of the more junior members in my team, I have been lucky enough to assist in some very high-profile cases regarding offshore trust disputes. Having said this, I also feel that with every new matter (big or small) comes a great deal of learning. I consider the fact that I am able to constantly learn and evolve and use the skills I have acquired in all of my matters, a great achievement.

**Q** Why did you choose to attend Private Client Summer School and what did you achieve by attending?

**A** There was a great array of talks being held which covered all areas of private client work, both non contentious and

contentious. What I most liked about it was that the content was prepared specifically with junior practitioners in mind. The speakers are also all leaders in their fields, and I was very keen to learn from them and speak to them in person. Last, but certainly not least, I thought it would be a great opportunity to meet and build connections with fellow private client practitioners (from regional firms and those abroad). I was able to do just that.

**Q** What was your key takeaway from any of the sessions at Private Client Summer School?

**A** I have so many takeaways, it is hard to pick just one! I would say the talk on "ESG and Investments" was incredibly engaging and very relevant. I was particularly interested in how trustees are having to consider the changing priorities of new generation beneficiaries. With this upcoming shift in generational wealth, it seems that trustees are, more so now than ever, needing to check their powers when considering environmental and socially responsible investments.

**Q** What would you say to people thinking of attending one of our summer schools in the future?

**A** I would tell them to attend, absolutely. It is such a brilliant two days: there's a huge amount to gain in terms of learning, networking opportunities and career inspiration.

**Q** What do you see as the most significant trend in your practice in a year's time?

**A** I think we will likely see a big increase in ESG investments and a continued curiosity, especially by the upcoming generation, in cryptocurrency and NFTs.

**Q** What personality trait do you most attribute to your success?

**A** I would say perseverance

**Q** Who is your biggest role model in the industry?

**A** Dame Sarah Asplin who presented a talk at the Women in Chancery event, held by Charles Russell Speechlys, in summer of this year. She is a great role model for women seeking to progress in the legal world.

**Q** What does the perfect weekend look like?

**A** I would say playing a game of tennis, meeting with friends for a pub lunch, visiting an art gallery or exhibition and then snuggling up on the sofa to read a good book (preferably a thriller or historical fiction).

**Q** What is something you think everyone should do at least once in their lives?

**A** Travel/take a trip on their own.

**Q** What is a book you think everyone should read and why?

**A** This is a very tricky one! I would say in terms of my recent reads, my favorite has been, *The Silent Patient*, which is a superb thriller. A good one for those who enjoy exercising their detective skills!

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# Meet the TL4 Team

ThoughtLeaders4 is a full-service legal events and content provider with over 60 years combined experience. Leveraging our expertise and strong relationships with key experts across the globe we create focused communities, content and events that deliver critical knowledge transfer and new business opportunities.

Our aim is to create a community for members to share their thoughts, meet new contacts and to reconnect with existing friends.



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