

# TL4 & CONTRA PRIVATE CLIENT SUMMER SCHOOL 2021

SUMMARY



#### PRIVATE CLIENT SUMMER SCHOOL



"The main thing for me when deciding which industry events to attend or speak at is the ethos and culture of the event. That starts from the provider and with TL4 the ethos from the outset from the founders Paul, Danushka and Chris has been to run an inclusive programme of events, which mix quality content and fun activities. It is always a pleasure being part of a TL4 event!"

Simon Goldring, Partner, Maurice Turnor Gardner, and Co-Chair of ConTrA

On Thursday 26th August 2021, we opened the doors to our first in-person event at ThoughtLeaders4 by kicking it off with Private Client Summer School: The Ultimate Insider's Guide. For most delegates, this was the first event they had attended in over 18 months. For everyone in attendance at the summer school, there was a real sense of novelty to be back in the room where delegates were able to move freely, catch up, and begin to plant the seeds into relationships that will likely grow as they do in the industry.

"Meeting and connecting with peers to be able to exchange ideas freely and in an interactive forum, there's just a dynamism and energy that you don't find in the virtual world, and it's been fantastic to experience that again"

Jessica Henson, Co-Chair of ConTrA and Partner at Payne Hicks Beach

"Law's always been about sharing notes, intel and expertise for the benefit of the clients and to support and assist the process of the law, and that is so much better in person... I'm sure that the service that we provide to the clients is better as a result of the relationships that are forged, and the understanding that's shared at this type of event"

Catherine Calder, Partner at Serjeants' Inn - Event Partner

Presented by:





Continuing with the importance of supporting the next generation of practitioners in private client, we spent 60 seconds with some of our delegates at Private Client Summer School:







- What is your key area of practice?
- Trusts and inheritance disputes.
- What are you most going to focus on in the next 12 months?
- I have a number of cases which I have been working on for a long time (some since I qualified in 2018), which are going to trial / final hearing over the next 12 months so I will be looking forward to working on those and doing the best for our brilliant clients. I will also be focussing on making connections and meeting with other private client practitioners like many others, after the pandemic and a lot of virtual meetings and events, there is some lost time to make up for, in person!
- What do you see as the biggest upcoming challenge you face as a practitioner?
- I am taking on a management role as a supervisor for a trainee solicitor in our team, and we are in a hybrid working environment. I am really looking forward to taking on that challenge and assisting with the development of junior colleagues.
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?
- A I chose to attend for a few reasons.
  One was that the agenda looked very interesting and varied. I thought it was a great idea to do a mix of technical sessions on a variety of issues facing private

client practitioners – both contentious and non-contentious – and also soft skills sessions. Some of the sessions were good knowledge reinforcement, and then there were a lot of new points which I learned about too. Additionally, it is relatively rare to have an opportunity to attend a conference which is targeted at professionals at the junior end of their career. This was a great opportunity to meet peers and make connections for the future.

- How did it feel to be back at a physical event?
- A It was exciting. I am an advocate for utilising technology as much as possible, and I think virtual meetings and events are great. However, for me, there is no replacement for getting to know likeminded practitioners in person.
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- A There was so much informative and interesting content, it really is tricky to choose just one session. There was a great session about 'how to lose / keep clients' and one key point (amongst many) is the reminder to think creatively about what the particular clients' priorities are (which will obviously vary between clients and their legal interests) and to focus on those in the initial meeting(s).
- What would you say to people thinking of attending one of our summer schools in the future?

- I would tell them to go for it! And that when they do, make the most of speaking to as many attendees as possible and discuss your respective careers and experiences.
- What does the perfect weekend look like?
  - Hopefully the sun is shining. I go for a swim either in the local lido or a reservoir nearby. I spend time with my friends and partner maybe a few hours catching up in a pub garden. Then some cooking, watching a film, or reading are all good ways to relax on a weekend.
- What is the one thing you could not live without?
- A My planner/diary I love to make plans and keep organised, both in my professional and personal life. My planner is the place where most things in my mind and plans for the future are written down.
- Who would you most like to invite to a dinner party?
- Barack Obama.
- L







- What is your key area of practice?
- Everything that comes under the heading of 'Private Wealth Disputes'. This is a broad church and covers disputes relating to trusts, estates, lifetime gifts, as well as proprietary estoppel claims, claims under the Inheritance (Provision for Family and Dependants) Act 1975 and Court of Protection matters. My work frequently has an international, multi-jurisdictional element.
- What are you most going to focus on in the next 12 months?
- A It is difficult to predict this as the saying goes, "We plan, God laughs". That said, I hope to keep focusing on building my experience and delivering an excellent service for my clients.
- What do you see as the biggest upcoming challenge you face as a practitioner?
- The sheer volume of work. A combination of the Baby Boomers dying off (as I understand it, they are the wealthiest generation in history), the increasing rate of dementia, the pandemic and prevalence of remarriages (meaning there are often two factions in a family competing for the family pot) creates a pretty combustible mix.

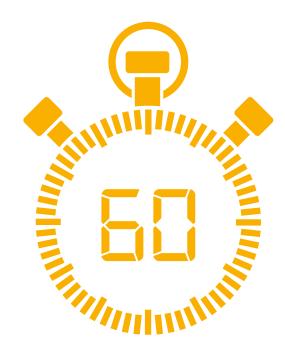
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?
- The content of the talks looked interesting. Escaping the (home) office to beautiful Downing College was also a pretty strong draw...
- How did it feel to be back at a physical event?
- Fantastic especially as the conference had a jolly and relaxed vibe.
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- A I don't have a key takeaway, rather a renewed respect for the excellent practitioners in my field.
- What would you say to people thinking of attending one of our summer schools in the future?
- A Go.
- What does the perfect weekend look like?
  - Walking my miniature wirehaired dachshund, Mimi, along the Thames Path.

- What is the one thing you could not live without?
- My yoga mat.
- Who would you most like to invite to a dinner party?
- The writer and journalist, Aidan Hartley.



# JERRY JAMIESON, ASSOCIATE, MAURICE TURNOR GARDNER





- What is your key area of practice?
- A Dispute Resolution Contentious Trusts and Probate
- What are you most going to focus on in the next 12 months?
- As I qualified less than a year ago, my focus will be to continue to learn as much as possible through my contentious trusts and probate work, whilst also taking on any noncontentious work that I can to supplement that.
- What do you see as the biggest upcoming challenge you face as a practitioner?
- (Hopefully) not a challenge so much as a re-adjustment but in the short term seeing where clients and the courts land re: virtual/ in-person and adjusting to that could be a tricky balancing act.
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?
- Two factors: the talks were all relevant and well targeted to those like me (i.e. practicing in private client/private client disputes, 0-5 PQE), and perhaps more importantly that meant that there would be a lot of attendees in similar positions to me that it would be nice to finally meet particularly as we'd all been limited to zoom for the last year and a half.

- How did it feel to be back at a physical event?
- A Lovely! Very odd (in a good way!) at first, but it's amazing how quickly it all feels normal. It was great to be able to actually have a conversation with the person sitting next to you instead of being plonked into a 100 person zoom webinar and automatically muted and the barbeque on Thursday night was certainly a big plus that couldn't be replicated virtually!
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- A That there's nothing wrong with asking what you might think is a stupid question most of the time everybody else will be wondering the same thing.
- What would you say to people thinking of attending one of our summer schools in the future?
- Do it! The sessions genuinely are all relevant and interesting, and it's a fantastic way to meet contemporaries at other firms. It's a fun (and informative!) 48 hours.
- What does the perfect weekend look like?
  - Sunny, and cricket-based I think, especially in the summer. I'm not sure that there's anything more enjoyable than village cricket, with friends, at a friendly rubbish

standard – and if I can get away with it in this fictional scenario, why not make it both days of the weekend?

- What is the one thing you could not live without?
- A I've just moved flat from somewhere which had no freezer which meant that (frozen) peas have been off the menu for over a year. Never again! They are the king of convenient vegetables. Frozen peas, final answer.
- Who would you most like to invite to a dinner party?
- As a supporter of the mighty
  Norwich city football club, it's an
  easy answer: Delia Smith. We'd
  talk about our shared love of the
  canaries and with any luck she'd
  take some pity on me and help with
  the cooking, meaning that it could
  be the first dinner party hosted by
  me with halfway edible food.

#### MAURICE TURNOR GARDNER



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

I'm an associate in our Trust,
Estate and Inheritance Disputes
team. We also cover Court of
Protection work alongside our
non-contentious elder law
specialists. I am one year qualified
so my practice is still pretty broad
– I would say roughly half my
clients are charities looking to
defend probate or inheritance
claims, and the rest are a mix of
private individuals and trustees/
executors.

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

A I qualified during the pandemic and have been working from my kitchen table, so it would have to be getting back in the office and learning from being around my colleagues for the first time. And, covid rules permitting, making up for the lost year and a half by meeting lots of new people!

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

A I think we have yet to see the full effects of how the pandemic will affect inheritance disputes – will we see lots of homemade wills? I'm also intrigued to see how many people have taken up the opportunity to have their wills witnessed remotely, and whether that will lead to challenges down the line.

## Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?

A It was the first time I really had a chance to meet many of my peers in person. We've had the odd Zoom catch up but it's not the same!

#### How did it feel to be back at a physical event?

A There was a bit of a 'deep breath moment' before walking into a room full of people for the first time, but we were all in the same boat (at least until we went punting, when the boats only held six). I think everyone realised how much they'd missed being in that big room all together.

## What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?

Many of my cases centre around mental capacity, so I really enjoyed Lorraine Jeffery and Sophia Roper's overview and particularly the crucial reminder that capacity is not a straight line – speaking to 'P' at 9am and speaking to them at 10am may lead to completely different assessments.

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

Do

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

Unfortunately lockdown has made me coffee-dependant, so it would have to be a flat white and a pastry followed by sitting out in the sun with a murder mystery. I'm currently working through Kate Atkinson's Jackson Brodie books but Agatha Christie will always be the Queen.

#### What is the one thing you could not live without?

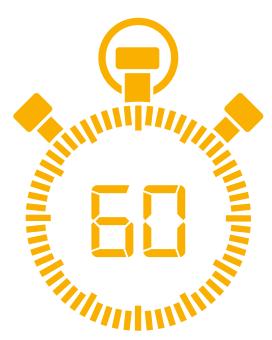
I love cooking, so probably salt.

#### Who would you most like to invite to a dinner party?

Elizabeth I – I did history at university and I'd be so interested to find out what she was actually like. She was famously intelligent, cultured and witty so I'm sure she'd turn out to be a brilliant guest (and also it sounds like she threw a great party herself so hopefully she'd invite me back).







- What is your key area of practice?
- A Commercial Dispute Resolution focused on Contentious Trusts in Guernsey and the BVI.
- What are you most going to focus on in the next 12 months?
- My main focus is going to be trying to pass the Guernsey Bar Exams to qualify as a Guernsey Advocate, but I also have a number of big deadlines coming up over the next 12 months which will no doubt keep me busy when I am not studying!
- What do you see as the biggest upcoming challenge you face as a practitioner?
- A Trying to juggle studying with work is going to be my personal biggest challenge. I'm fortunate that Collas Crill have been really supportive with studying while working.
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?
- To have an opportunity to network in a more informal and friendly way.

I've definitely picked up some networking skills which I hope will keep me in good stead for the future.

- How did it feel to be back at a physical event?
- A Great! My last in-person event was the ConTrA seminar in March 2020 and so it was nice to kick-off the first in-person event with ConTrA.
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- A Not from one session but I enjoyed seeing the different presentational styles people took. There were lots of different formats, which I hope will be of assistance for any future presentations that I need to give.
- What would you say to people thinking of attending one of our summer schools in the future?
  - I would say try and attend if you can. It's a great way to meet other lawyers of a similar level and the social events are pretty fun too!

- What does the perfect weekend look like?
- A Nothing beats a sunny day in Guernsey with a walk to Fermain Beach for a glass of wine with lunch and a swim if you are feeling brave!
- What is the one thing you could not live without?
- A Food. Stating the obvious, but I am a massive foodie and I am really enjoying the ability to travel to the UK again to try new restaurants.
- Who would you most like to invite to a dinner party?
- Yotam Ottolenghi in the hope that he may also cook too!

#### JANNIKA GLENDON, ASSOCIATE, MCDERMOTT WILL & EMERY





- What is your key area of practice?
- I focus my practice on dispute resolution issues, including contested estates, acting for high net worth individuals in private trust disputes, as well as commercial dispute resolution and arbitration.
- What are you most going to focus on in the next 12 months?
- As a junior, I am focusing on continuing to build my knowledge and network, as well as getting as much exposure to different kinds of dispute resolution issues as I can, in particular multi-jurisdictional work.
- What do you see as the biggest upcoming challenge you face as a practitioner?
- As we adjust to the new normal of more flexible working (and more time spent in the spare room!), I think it is important, particularly for junior associates, to ensure we stay connected to and learn from our colleagues, keep up to date with knowhow and stay present and active. I think also importantly and for the same reason, we should really be taking extra care of our physical and mental wellbeing.
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?

- A I knew that it would be an informative and fun event, where I would have the opportunity to learn from some of the most knowledgeable and respected individuals in their field. I also really like the varied topics of the talks, and the chance to network with juniors from so many other firms.
- How did it feel to be back at a physical event?
- A It was a breath of fresh air! It felt great to be able to connect to people face to face.
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- A I found the talks on mental capacity and 1975 Act Claims & Probate Disputes really interesting, in particular it drove home how important it is to really get to know your client and their objectives, to take instructions at the right time and remain alive to your professional duties.
- What would you say to people thinking of attending one of our summer schools in the future?
  - I would recommend it it's a great way to network as well as boost your knowledge in a relaxed environment, oh and the beautiful location of the event definitely helped!

- What does the perfect weekend look like?
- A lie in, sunshine, time in nature and good food, company and wine!
- What is the one thing you could not live without?
- A Travelling and seeing the world.
- Who would you most like to invite to a dinner party?
- The Buddha, so I can learn the ways of Zen!





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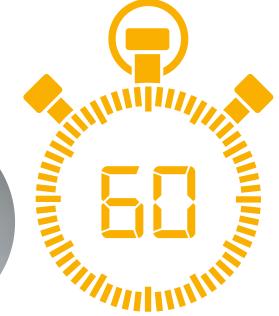






#### DANIEL THORPE, BARRISTER, RADCLIFFE CHAMBERS





- What is your key area of practice?
- I am building a varied practice across all of Chambers' core areas of work. This includes private client, insolvency, commercial and real property disputes.
- What are you most going to focus on in the next 12 months?
- A Being so junior it is difficult to say at the moment! I have been taking on my own cases since April 2021 and have been working on a wide range of things. I'd like to continue getting experience in as many different areas as possible so as to give myself a solid grounding for years to come.
- What do you see as the biggest upcoming challenge you face as a practitioner?
- A Starting practice during the pandemic was not without its difficulties, but the result is that I will likely find it challenging to start attending things in person! This is probably at odds with more senior colleagues, but having only appeared in court via telephone or Microsoft Teams, an in-person hearing will be quite the sea change.

- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?
- A The Summer School seemed like it would a great opportunity to meet junior private client practitioners and it was exactly that. It was great talking to people from different law firms and chambers and sharing experiences.
- How did it feel to be back at a physical event?
- A Fantastic I think everyone enjoyed their freedom from the well-known limitations of virtual events.
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- A It was interesting listening to Richard Manyon (Payne Hicks Beach) and Gemma Willingham (Baker McKenzie) on the fine distinction between winning and losing clients and how best to apply yourself in seeking work whilst not going too far.

- What would you say to people thinking of attending one of our summer schools in the future?
- A If you're eager to learn something about that practice area amongst people of similar experience from different backgrounds, then definitely sign up.
- What does the perfect weekend look like?
- A 25 degrees with blue skies and sunshine (i.e. not like August 2021).
- What is the one thing you could not live without?
- Although not particularly exciting, it probably is my laptop.
- Who would you most like to invite to a dinner party?
- A Sir Alex Ferguson who else?





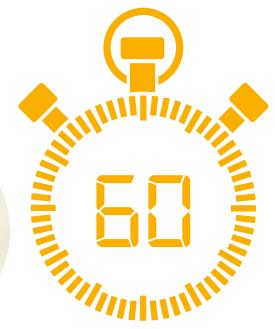
- What is your key area of practice?
- A Private client tax dual qualified US/UK
- What are you most going to focus on in the next 12 months?
- A Building my portfolio and crypto advice.
- What do you see as the biggest upcoming challenge you face as a practitioner?
- Autonomy
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?
- I chose to go as I wanted to attend an in person networking event. I met lots of new people and broadened my trust knowledge. As I work in private client personal tax I learnt a lot.

- How did it feel to be back at a physical event?
- Amazing.
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- The importance of a watertight Will.
- What would you say to people thinking of attending one of our summer schools in the
- A Be prepared to meet new people and don't just stick with your colleagues.
- What does the perfect weekend look like?
- Meals in the sunshine and to be by water.

- What is the one thing you could not live without?
- My headphones.
- Who would you most like to invite to a dinner party?
- Leonardo da Vinci
- L







- What is your key area of practice?
- I deal with trusts and estates disputes of all types, both onshore and offshore.
- What are you most going to focus on in the next 12 months?
- A Meeting clients and contacts old and new face-to-face to make up for lost time, as well as developing new recruits into our team at BDB Pitmans in their careers.
- What do you see as the biggest upcoming challenge you face as a practitioner?
- A Ensuring a cost-effective delivery of a good outcome for the client as litigation is still prohibitively expensive.
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?
- It was an opportunity to meet my peers from other firms in my hometown (I live in Cambridge). I made some exciting new connections and had many laughs. I also learnt that the Downing College venue was once the subject of an estate dispute.

- How did it feel to be back at a physical event?
- Absolutely brilliant. Life is all about people and connection and that is always best achieved face-to-face.
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- A Tax laws will never be simplified.
- What would you say to people thinking of attending one of our summer schools in the future?
- A Take the opportunity to meet new people in a relaxed, enjoyable environment, make new connections and learn a thing or two along the way. Although aimed at the more junior end of the profession it is still an event worth attending for those of us who are a little further on in our careers.
- What does the perfect weekend look like?
- A Doing something active outdoors with friends, followed by a meal in a country pub.

- What is the one thing you could not live without?
- Coffee.
- Who would you most like to invite to a dinner party?
- A Lady Hale or Brandon Flowers. I can't decide between the two. Obviously for entirely different reasons!





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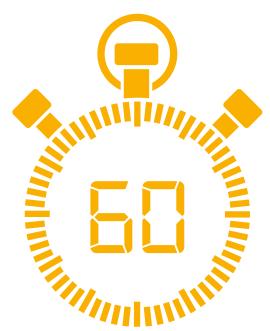


- What is your key area of practice?
- A I specialise in contentious trusts and pensions disputes.
- What are you most going to focus on in the next 12 months?
- Within contentious trusts, I will be focusing on breach of trust claims, negligence claims and bringing a construction application.
- What do you see as the biggest upcoming challenge you face as a practitioner?
- A Being able to build a network of clients.
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?
- To attend in-person training on trusts law (covering all sorts of fascinating topics) and have the opportunity to meet other junior lawyers in the industry.

- How did it feel to be back at a physical event?
- A It was fantastic it is so much easier to make long-lasting memories with colleagues at a physical event and be able to digest the information being given to you without the distractions that come with being on screen at
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- 1) the complexity of trusts law which has created a host of different specialities that different practitioners have specialised in within the industry and 2) the importance of prioritising your training time and taking days out of the office to develop your knowledge of the law and meet other junior lawyers on your level.
- What would you say to people thinking of attending one of our summer schools in the future?
- Don't hesitate!

- What does the perfect weekend look like?
- A Exploring the City with friends, and leaving some time to relax at home and learn new songs on my piano.
- What is the one thing you could not live without?
- A Lewin on Trusts (it has all the answers..)
- Who would you most like to invite to a dinner party?
- A Thomas Lewin





- What is your key area of practice?
- A I work in the international private client and trusts team at Collas Crill.
- What are you most going to focus on in the next 12 months?
- Over the next 12 months I hope to consolidate what I have learned so far since making the move to the offshore market in February 2021. My personal focus will be split three ways: 1) developing my knowledge of the offshore estate and succession planning world 2) developing my knowledge and expertise in trust advisory work 3) undertaking the STEP diploma in International Trust Management.
- What do you see as the biggest upcoming challenge you face as a practitioner?
- A Striking the balance between producing high quality work while also meeting the time and financial expectations of clients. Also winning new work in an increasingly competitive world where there is always someone (or something AI) that can do a similar job quicker, cheaper or both.
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?

- A I wanted to broaden my own knowledge whilst meeting other practitioners in my own practice area and practice areas where there is a good amount of overlap and cross-referral. I definitely achieved this and left motivated to improve my expertise and network.
- How did it feel to be back at a physical event?
- A It was very good. Admittedly a bit strange at first but any nerves or concerns about mixing in large groups etc were quickly overcome.
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- A Sophia Rogers' session on Probate Disputes was a highlight and my main takeaway was the need to be acutely aware of capacity concerns and the importance of clearly documenting the steps undertaken to investigate a client's capacity, or lack thereof.
- What would you say to people thinking of attending one of our summer schools in the future?
  - Go for it. Even if unsure of what you will take from it, attend with an open mind and you will learn something new and meet people with like-minded interests and careers.

- What does the perfect weekend look like?
- A Lots of good food and my trail running shoes for two uninterrupted days of hill running in Glencoe, Scotland.
- What is the one thing you could not live without?
- A My wife and son, everything else is just stuff.
- Who would you most like to invite to a dinner party?
- A Eliud Kipchoge





- What is your key area of practice?
- Contentious trusts and estates.
- What are you most going to focus on in the next 12 months?
- A Building my knowledge and expertise in trusts litigation while continuing to deal with IA claims, validity claims, Mutual Wills, disputes between executors, claims involving charities, ToLATA claims and forgery claims.
- What do you see as the biggest upcoming challenge you face as a practitioner?
- Acting for clients dealing with relatively small value estates while continuing to act for High Net Worth clients and Trustees in respect of high value (and sometimes high profile) estate disputes. I wish to act for clients across the market and continue to provide a credible alternative to London practitioners from a leading team regional firm while maintaining the variety of work that comes with working for clients at both ends of the market.
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?

- I wanted to broaden my knowledge of Trusts law, insolvency law, company law and charity law and attending the conference did just that, as well as cementing and furthering my knowledge in the areas I predominantly practice in.
- How did it feel to be back at a physical event?
- A It was nice to network in person at long last!
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- That double portions does not just mean returning for a second mini banoffee pie.
- What would you say to people thinking of attending one of our summer schools in the future?
- A It is a good way to receive training on a variety of subject areas within a short window of time in a nice setting.
- What does the perfect weekend look like?
  - Anything relaxing whether that is a country walk, a swim in the sea, a meal at a nice restaurant or a trip away. The activity does not matter being able to wind down and switch off is the important thing.

- What is the one thing you could not live without?
- A Food.
- Who would you most like to invite to a dinner party?
- A Simon Reeves. Maybe I can persuade him to let me and my husband tag along on one of his amazing adventures.





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Clients choose us to steer them through crucial cases, often involving important legal, ethical and social issues.

Serjeants' Inn is at the cutting-edge of the law concerning decision-making for those lacking capacity. Our work encompasses all aspects of health and welfare and property and affairs (involving assets in the UK and internationally), both contentious and non-contentious. Our barristers regularly advise and act for the Official Solicitor, the Office of Public Guardian, NHS Bodies, attorneys, deputies (professional and lay), trustees, charities and family members in relation to a broad variety of legal and factual issues. We are highly sought after by clients seeking advice in this area and the overlap with family and probate work.

Ranked as Band One for Court of Protection by both leading legal directories, clients quoted in Chambers UK describe us as "always the first port of call for complex and high-profile cases." With "simply superb" Clerks and a dedicated Client Care Team which is "unique at the Bar", we are well equipped to support our instructing solicitors in meeting the requirements of private clients, drawing on a track record of assisting ultra-high and high net worth individuals and families across a range of disciplines, including human rights claims, inquests, medical law, information law and business and specialist crime.

Since 2016, Serjeants' Inn has expanded its silk team from 9 to 22 QCs, recruited 28 new tenants and won 27 awards. We are described by the Financial Times as "stand-out" in terms of our success in "facilitating a partnership between clients and Chambers and introducing initiatives to help clients...".

Please do contact our Joint Chief Executive, Catherine Calder, on her direct line (020 7427 5012) to discuss how we might put this approach into practice for you and your clients.

> "The exceptional Serjeants' Inn Chambers is instructed in some of the most prominent cases in the country." Chambers & Partners







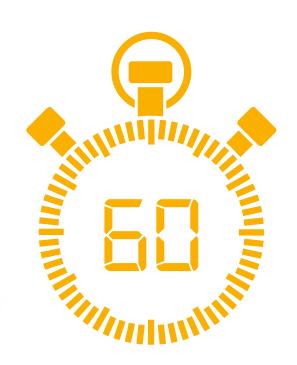
- What is your key area of practice?
- Contentious trusts & probate
- What are you most going to focus on in the next 12 months?
- Networking
- What do you see as the biggest upcoming challenge you face as a practitioner?
- A Increased reliance on technology and the potential hurdles if that technology fails
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?
- A I chose to attend as I thought the agenda looked interesting and I wished to develop my knowledge of both the contentious/non-contentious side of private client. I felt that the School provided me with a nice mix of refreshing my knowledge whilst teaching me new things that I have not had exposure to previously.

- How did it feel to be back at a physical event?
- A Enjoyable to be back out socialising and meeting new people
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- A Never be afraid to ask questions

   whatever level of your career you are at.
- What would you say to people thinking of attending one of our summer schools in the future?
- A great opportunity to expand your network, improve your current knowledge and learn new things too
- What does the perfect weekend look like?
- A mixture of seeing friends, exercising and relaxing at the Spa.

- What is the one thing you could not live without?
- My kitten Taylor Squish
- Who would you most like to invite to a dinner party?
- Mo Farah
- L





- What is your key area of practice?
- At present I do a mixture of non-contentious estate planning and contentious trusts and probate work, with a view to specializing into the latter once I have a strong foundation in both practices.
- What are you most going to focus on in the next 12 months?
- My main focus over the next year will be on developing my technical knowledge and gaining exposure to a broad variety of work.
- What do you see as the biggest upcoming challenge you face as a practitioner?
- A I think as a newly qualified solicitor homeworking has been challenging junior practitioners learning and development opportunities.

  Moving forward in a hybrid working environment I see that juniors will need to seek out and prioritize the face-to-face, 'learning by osmosis' opportunities that we have no doubt missed out on as a result of the pandemic.
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?

- A I thought the conference was a fantastic opportunity to meet and network with other practitioners, particularly as face to face networking has not been possible for such a long time. I also felt that I had a lot to benefit from the talks, as they covered a broad array of issues that private client practitioners face and was a great introduction to this area of law.
- How did it feel to be back at a physical event?
- A I thoroughly enjoyed being at a physical event and I certainly prefer this style to the online format we have become so accustomed to over the past 18 months.
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- A One unexpected takeaway from the event was that even as an NQ I should be prioritizing my career development by formulating a strategy for my progression now and building my network with that strategy in mind.
- What would you say to people thinking of attending one of our summer schools in the future?

- I would strongly encourage anyone looking to attend a summer school in the future. It is a great opportunity to get out of the office, learn from leading practitioners and expand your network at the same time.
- What does the perfect weekend look like?
- A My perfect weekend would be anywhere with my friends, with some great food and a glass of wine (or two).
- What is the one thing you could not live without?
- A Travelling.
- Who would you most like to invite to a dinner party?
- Gordon Ramsey for the entertainment and if nothing else some great cooking tips.







### JOIN THE COMMUNITY

Join our community of **2000+ practitioners** involved in the Private Client intermediary network. Hear about the latest online and in person events, fresh content and special member offers.



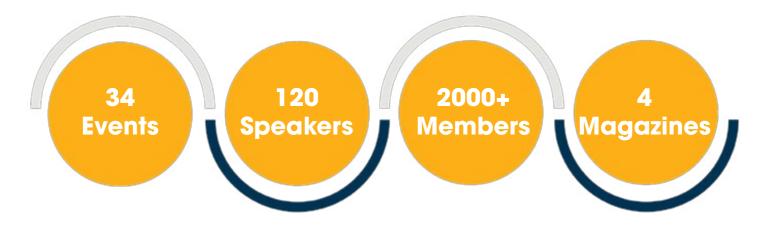
















- My work is primarily personal tax advice, with a strong focus on international clients both with or looking to have a presence in the UK.
- What are you most going to focus on in the next 12 months?
- A Taking advantage of seeing people in person, especially going to meetings to learn the tricks of the trade.
- What do you see as the biggest upcoming challenge you face as a practitioner?
- A The increasing regimes of transparency and compliance. Sometimes they can overwhelm the actual legal advice.
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?
- A It was one the first events I could attend. I got to meet a lot of new people which has been ... challenging over the last 18 months.

- How did it feel to be back at a physical event?
  - A Brilliant, and the set up was perfect. You could almost forget what has been going on.
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- Mine was about the importance of working with trustees and intermediaries to effect what is best for the client, not just what they want. Don't think I ever learned where the fire meeting point was though.
- What would you say to people thinking of attending one of our summer schools in the future?
- A Do it! A great chance to get up to speed on new law, learn some top tips and mix with your peers in a relaxed environment.
- What does the perfect weekend look like?
  - It really depends on how busy my week has been, though at the moment I am trying to catch up with people as much as possible.

    Can't go wrong with a pub lunch by a fire on a dreary day though.

- What is the one thing you could not live without?
- My glasses. Boring but practical. I need to read a lot for my job.
- Who would you most like to invite to a dinner party?
- A Nigella Lawson if she offers to cook...









- What is your key area of practice?
- Commercial chancery
- What are you most going to focus on in the next 12 months?
- A Building my practice after completing pupillage (and hopefully spending plenty of time on my feet!)
- What do you see as the biggest upcoming challenge you face as a practitioner?
- A Making up for lost time in creating relationships within the sector after a largely remote pupillage.
- Why did you choose to attend TL4 x ConTrA's Private Client Summer School and what did you achieve from attending?
- A I hoped to meet people also involved in private client work something that I definitely achieved!

- How did it feel to be back at a physical event?
- A It felt great I appreciated the coloured wrist band system TL4 used to show what level of social distancing attendees felt comfortable with.
- What was your key takeaway from any one of the sessions at Private Client Summer School over the 2 days?
- A That it takes around 7 or 8 times of meeting someone to forge a proper connection in a networking context. Great advice and gives me an excellent excuse to repeatedly go for drinks with people!
- What would you say to people thinking of attending one of our summer schools in the future?
- A Go! The relaxed set up makes it easy to meet new people both of your level of call, and the more senior speakers. The talks were a great combination of legal knowledge and practical career advice.

- What does the perfect weekend look like?
- A series of pub walks with my pandemic puppy!
- What is the one thing you could not live without?
- A Reading.
- Who would you most like to invite to a dinner party?
- A Lady Hale (I am an unashamed fangirl!)



## Private Client

A unique community designed for all practitioners involved in the Private Client intermediary network. Connecting solicitors, barristers, trustees, fiduciaries and wealth advisers, our community is built on partnership and collaboration focusing on valuable and practical content.

## TITH HNW Divorce

A unique community targeted at professionals whose practice encompasses or touches upon HNW Divorce. Exclusively focused on HNW Divorces and the myriad issues that arise in family law but also including private client, asset recovery and commercial disputes that arise as the result.



## FIRE

Fraud. Insolvency. Recovery. Enforcement.

The global Asset Recovery community bringing together key practitioners across contentious insolvency, fraud litigation and international enforcement.

## Disputes

A specialist community connecting private practice lawyers, barristers and industry experts involved in complex, cross-border commercial litigation and international arbitration.