March 2024

Liverpool Law

Liverpool (LawSociety

THE MAGAZINE FOR THE LEGAL SECTOR IN MERSEYSIDE AND THE NORTH WEST





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The Law Society

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Fri, 24.05.24
Tues, 25.06.24
Tues, 23.07.24
Tues, 27.08.24
Tues, 22.10.24
Tues, 26.11.24



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Liverpool Law Society Magazine is produced by and for Liverpool Law Society Members. This is our opportunity to share our news, events and celebrations with our friends in the legal community.

All members' contributions to Liverpool Law are warmly welcomed. Please send your article (and photo captions where possible) or request for further information, or assistance to the editor at <u>editor@liverpoollawsociety.org.uk</u>

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Editorial Committee Dates 2024

Meetings start at 01.00 pm on a Tuesday, except where noted.

19.03.24
16.04.24
21.05.24
18.06.24
17.07.24
20.08.24
17.09.24
15.10.24
19.11.24

Welcome to the March edition of Liverpool Law



This month we have yet another jam packed edition for you. Our size is now reaching 60+ pages and continuing to grow month by month. That is all testament to you sending us your submissions and attending LLS events and courses to keep us all busy, so thank you. As always please continue to send them in to editor@liverpoollawsociety.org.uk or you can now tag us on our new social media handles to draw our attention to anything you

would like to include. Although for now I would be grateful if you could do both as we are still in the very early teething stages with this. Also another plea if I can to follow/like and share our new handles.

I had the honour this month of attending the LJMU event talking to students about overcoming challenges in the legal profession. As a former student it was so nice to have this opportunity along with fellow Directors **Alum Ullah** and **Rachel Stalker** and my good friend **Paula Doran** to meet students and answer any questions they had. I have also been back to Goodison to work with Everton in the Community on the Weightmans internship programme for them and I'm so pleased that their work is included as the charity feature this month. I think it is so important to give back and help those with career aspirations who maybe, like me, didn't have any legal connections to guide them. I would have loved these opportunities as a student so very well done to all for arranging, the future really is in safe hands.

Many congratulations and good luck to **Alan Kelly** who has retired from Vauxhall Law Centre. His work has been mentioned in their column this month and we have invited Alan to write a personal article on his wonderful work. Alan was one of the first contacts I made when I joined the editorial committee managing our CSR page and was always the smiling face at our events when I was finding my feet. I have enjoyed working with him over the years to highlight their work and in the regular column for you all to enjoy. I'm sure you will all join me in wishing him the best of luck and a well earned rest!

Many thanks

Jennifer Powell, Editor Weightmans editor@liverpoollawsociety.org.uk

Welcome to new members

We would like to give a warm welcome to our new members who were approved for membership at February's General Committee meeting. There were 25 individuals from the following organisations:

- Bermans Brabners Campion Solicitors Canter Levin & Berg
- Carpenters Clyde & Co Jackson Lees Group Kennan Doyle Solicitors
- Leigh Day Liverpool University Hospitals NHS Foundation Trust Morecrofts
- MSB Solicitors Paralegal Service Sunderland University of Liverpool
- Wilde & Company

Liverpool Law Society's membership now exceeds 2,585 individuals from 174 law firms, barristers' Chambers, and other organisations with legal professionals in the Liverpool City Region and beyond.

Liverpool (LawSociety

From the President

The latest from the President, Gaynor Williams

On 8 February 2024 I attended a meeting of the Joint V Officer representatives, hosted by Leeds Law Society. Unfortunately, I managed to catch covid that week and was unable to attend the meeting face to face, but with the wonders of teams, I attended virtually.

Richard Atkinson, Vice President of The Law Society (TLS) provided an update about TLS's success with a judicial review against the Ministry of Justice (MOJ) for failure to increase criminal defence solicitors' legal aid rates by the bare minimum 15%. TLS has asked for a meeting with the Lord Chancellor, and they are also waiting an update from MOJ. **Richard** also provided an update about the delays with the Senior Courts Costs Office (SCCO), an issue already raised by **John Paul Dennis**, Chair of the non-contentious business committee. SCCO have advised TLS that they have taken on another member of staff and that they are working overtime to try and clear the severe backlog.

Turning to our busy Access to Justice committee, we met on 9 February 2024, and I was pleased to receive an update from Vauxhall Law Centre about the progress of the Wirral advice centre. This is a project I have been working on for over a year, and it is now starting to take shape. It has a base at WEB charity in Birkenhead, and initial advice sessions have been offered to service users, resulting in high demand from people with some complex cases. I am hoping to meet **Elly Smith** from Vauxhall Law Centre and **Bernie King** from WEB next month, and I will keep you updated with the progress.

Access to justice has been topical this month, with ever increasing advice deserts charities such as Vauxhall Law Centre and Merseyside Law Centre are facing an unprecedented demand for assistance with legal issues. Liverpool city region has a desperate homelessness and housing crisis, as reported in the Law Gazette <u>https://www.lawgazette.co.uk/features/left-in-the-lurch-inliverpool/5118692.article</u>. As a society we are doing all we can to raise these issues with local authorities and MPs, and we have the housing advice crisis and associated homelessness on the agenda for the meeting with MP's on 15 March 2024.

On 14 February I met with the charity Local Solutions who work very hard in the Liverpool city region. They have a 'Big Sleep Out' at Liverpool cricket club in aid of tackling homeliness on 7 March 2024, if anyone fancies supporting this worthy cause please visit <u>https://localsolutions.org.uk/bigsleepout/</u>

On 19 February I was honoured to be invited to be part of Birmingham Law Society (BLS) judging panel. Together with **Joanna Hughes** from Joanna Hughes Solicitor Apprenticeships, and **Rebecca Mander** from GuruYou, we spent a day interviewing talented and dedicated students and lawyers who had been shortlisted for awards. I am looking forward to attending BLS awards on 14 March 2024 and meeting the finalists in person.



On 21 February we had an evening with the winners of LLS Legal awards from 2023, together with the sponsors. The event was hosted by Fazenda bar and grill and they provided the attendees with drinks and delicious canapes. I enjoyed getting a chance to speak to the winners and to thank the sponsors too.

As I write this, I am looking forward to attending the Institute of Taxation dinner on 29 February 2024 and Insurance Institute of Liverpool's dinner on 1 March 2024.

We have our committee social for all LLS committee members on 29 February 2024 at The Lady of Mann, 19 Dale Street, Liverpool. This is an informal 'get together' and has been a great success since it started last year.

Looking forward, we have our LLS Charity Golf tournament on 6 June 2024, spaces are filling up so I would urge firms to book on now, it looks to be a fun filled day and evening, and I expect to see some competitive team spirit. Also, don't forget to save the date of 14 November 2024 for our annual dinner and law awards, nominations are open 1 July 2024, and more information will be on LLS website in due course.

Gaynor Williams

President president@liverpoollawsociety.org.uk



LLS Meetings & events – March/April 2024

Start Time	Meeting/Event
12/03/2024 12:30	General Committee
15/03/2024 13:00	Directors & local MPs meeting
19/03/2024 13:00	Editorial Sub-Committee
20/03/2024 13:00	Civil Litigation Sub-Committee
21/03/2024 13:00	Future Planning Sub-Committee
26/03/2024 12:30	Finance & Policy Sub-Committee
27/03/2024 13:00	Equality, Diversity & Inclusion Sub-Committee
28/03/2024 16:00	Criminal Practice Sub-Committee
04/04/2024 13:00	Access to Justice Sub-Committee
09/04/2024 12:30	General Committee
10/04/2024 16:00	Family Business Sub-Committee

Liverpool Law Society has a number of committees covering specialist areas of law which meet regularly throughout the year allowing members of Liverpool Law Society to discuss common issues, respond to consultation papers and contribute ideas towards the Society's comprehensive legal training programme.

Our committees are: Access to Justice; Civil Litigation; Criminal Practice; Employment Law; Equality, Diversity & Inclusion; Editorial; Family Business; In-House Lawyers; Non-Contentious Business and Regulatory committees, which are open to all members of Liverpool Law Society. To enquire about your membership status and/or being co-opted onto one of the above committees, please email <u>committees@liverpoollawsociety.org.uk</u>

Consultation Papers

Papers referred to committees:

The following sub-committees of Liverpool Law Society are considering responding to these consultation papers. If any member would like to send in a comment for consideration by the relevant committee, please do so to <u>committees@liverpoollawsociety.org.uk</u>

Committee	Consultation Paper title	Closing date
Civil Litigation/Non- Contentious Business	Contractual controls on land: consultation	20.03.24
Civil Litigation	Consultation on reforms to social housing allocations	26.03.24
Criminal Practice	Crime Lower Consultation	28.03.24
Civil Litigation/Non- Contentious Business	Competence and Conduct Standard for social housing: consultation	02.04.24
Criminal Practice	Blackmail, kidnap and false imprisonment guidelines – consultation	24.04.24
Civil Litigation	Awaab's Law: Consultation on timescales for repairs in the social rented sector	05.06.24

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SRA's review of consumer protection – deadline for submissions 1 July 2024

The SRA have recently <u>launched a review</u> of its overall approach to protecting consumers in response to shifting risks in the sector. The Law Society have welcomed this review, which is timely in light of the serious consequences of the collapse of Axiom Ince. The review's main points of focus are consumer protection and the Compensation Fund.

The Law Society shall be working with the SRA as it undertakes this work and will be ensuring the views of its members are heard. There is also the opportunity to feed into the SRA directly, as they will be carrying out in-depth research with the profession to identify the best approach to protecting consumers and serving public interest in the long-term. Current opportunities to get involved are as follows:

- 12 March 2024 (roundtable): representatives from high street solicitors focusing on issues concerning probate and conveyancing.
- 13 March 2024 (roundtable): representatives from consumer groups.
- 21 March 2024 (roundtable): solicitor representative groups.
- 26 March 2024 (roundtable): representatives from local law societies.

All roundtables can be registered by getting in touch with the SRA <u>here</u>. Find out more <u>here</u>.

Media Update

The Liverpool Law Society Regulatory Committee submitted a response to the SRA's consultation paper on 'Protecting consumers from excessive charges in financial service claims' last year. The response was mentioned recently in a Law Society Gazette article written by John Hyde. You can read the article <u>here</u>.





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Meet the new Vice-President: James Mannouch



James Mannouch has been elected Vice President of LLS for 2024. He is both Supervising Solicitor and Pro Bono Coordinator at University of Law, overseeing the work of the Legal Advice Centre at both Liverpool and Chester campuses. He is also the second-longest serving Director of LLS having chaired the Environmental Law Committee, Training Committee, Access to Justice Committee and the Joint Forum on Access to Advice. He was Treasurer in 2022 and Deputy Vice President last year. James initially studied single honours politics at Liverpool University, followed by a Masters in Public Administration, majoring in Marketing. This led to a job in television advertising, working with Millward Brown International. He then switched to a new position in retail at Great Universal Stores/Argos retail, ending up as project manager, building up an ordering infrastructure which delivered one of the first e-commerce systems in the UK.

James' next post was running the customer service department at Bunzl Retail and it was during this time that a call from a former work colleague persuaded him to take stock of his career and consider new challenges. To help him reflect on his options, James took time out, driving around Europe in a classic sports car, eventually deciding on a legal career, and qualifying through the University of Law in Chester where he obtained Distinction.

James was offered a training contract with Hill Dickinson and subsequently worked in Regulatory Law at Dyne Solicitors in Tattenhall, Cheshire, where he'd previously done paralegal work.

James rose to Commercial Director at Dyne solicitors, but his career took another turn when he was invited to deliver a talk on law to the sixth form students at the Academy of St Nicholas. This went so well that the college principal invited him to hold regular sessions, which prompted him to move into education.

In addition to supporting Gaynor as President, James is passionate about keeping up the good work of the Access to Justice Committee with consultations and campaigns to bring together Practitioners and other support providers. He is keen to promote the idea of more solicitors becoming involved in pro bono work.

When time allows, outside his busy work schedule, James likes to play tennis and visit his local pub.

We wish James every success in his new position.

Access to Justice Committee

The Access to Justice Committee met in February. It was a well-attended meeting comprising solicitors and representatives of local advice agencies.

The Committee responds to consultations wherever it can, and it was noted that members had provided a significant input into LLS' response to the Green Paper "*Proposals for a 21st Century Justice system*", providing practical insight into the Law Society's proposals for an online legal solutions tool. Members had also liaised with the national Law Society to help it build case studies involving legal aid solicitors.

A properly funded legal aid system lies at the heart of access of justice, and the Committee heard from solicitors working under the regime. The Ministry of Justice is consulting formally through its Consultation *"Review of Civil Legal Aid – Call for* *Evidence*", and informally through its use of regional Focus Groups. The Committee heard from respondents to both and encouraged others to participate.

The Committee is campaigning for better provision of housing advice within the Liverpool City Region and its surrounding areas. Provision has dwindled and improvements are required. The Committee heard from advice providers, and it will use this information to lobby MPs and Councillors. It will also liaise with providers to see if referral relationships and efficiencies can be created.

Anyone wishing to join the Committee would be most welcome. Please email <u>james.mannouch@law.ac.uk</u> for further details.

James Mannouch - Chair



Meet the new Chair of the Civil Litigation committee of the Liverpool Law society



Jonathan Berkson -Solicitor at Bermans

Jonathan was born and brought up on the Wirral having attended Wellington School and Calday Grammar before graduating in law from Bristol Poly and completing his Law Society Finals in 1988 at the College of Law, Chester.

Jonathan is married to a Liverpool solicitor and has 2 children aged 23 and 20 who have so far chosen to avoid the law, which is surprising given the number of Liverpool lawyers, past and present, in Jonathan's immediate and extended family.

Jonathan qualified in 1990 whilst working for Louis Berkson & Glode (a firm that his grandfather founded in Liverpool) but moved to Hill Dickinson in Liverpool in 1991 to act for business clients. Whilst at Hill Dickinson, Jonathan discovered an interest in asset finance litigation and in 2013 he moved to the Liverpool based Commercial firm of Bermans, which boasts a nationwide recognised niche in asset finance law, where he works as a Partner in the Finance and Litigation teams.

With over 34 years of experience in litigation he is highly qualified to lead the Liverpool Law Society's civil litigators in this ever-changing field of practice. Whilst Jonathan's work is mainly in the High Court's Business and Property Court (KBD) the litigation work he has been involved in has been varied and examples include:

• Acting for a US commercial financier in a claim under a Connecticut law guarantee against a UK based guarantor. The Agreement and guarantee were challenged by the guarantor but after 2 High Court trials and a Court of Appeal ruling, Jonathan's client was successful in obtaining judgment. (*Porter Capital v Masters 2017 EWHC 2215*)

- Jonathan acted for Bibby Financial Services, a Liverpool based financier, in the High Court and Court of Appeal where the general principles of set off were restated. The case is widely cited in the legal textbooks. (*Bibby Factors Northwest Limited v HFD Limited and MCD Group Limited [2015] EWCA Civ* 1908)
- In *Jivraj v Haswani 2011 UKSC.40* Jonathan acted for Mr Jivraj (a party to a JV agreement of 1981 which contained an arbitration clause) in the first instance through the Court of Appeal to the Supreme Court. The main issue involved the choice of arbitrator selected and the principle that an Arbitrator is not an employee of the parties was firmly established.
- Jonathan represented a waste management company in a procurement action. EWC were successful in the High Court persuading the High Court Judge that the Council's procurement process was biased. The Council challenged the High Court decision on appeal to the Court of Appeal, where the Court of Appeal held that the procurement result may be defective where an *"irrelevant consideration"* had subconsciously influenced the final marking of a tender. *EWC v Lancashire County Council 2010 – EWCA CIV 1381*
- Whilst Jonathan is not a personal injury litigator, he has had some experience of the practice area when he acted for a developer who developed an old gasworks site into a block of residential flats in Liverpool. Over 50 of the local residents brought a claim in the Liverpool County Court for personal injuries alleging injury from leaked contaminants from the site. Prior to trail last year the claim was discontinued by the claimants.

All in all, Jonathan has had over 34 years'

experience of handling commercial disputes in all sectors of business, acting for both claimants and defendants and for a range of clients including financiers, manufacturers, distributors, professionals and for large corporations and owner managed businesses. He hopes that this experience will stand him in good stead to represent the committee.

When asked about his role Jonathan said:

"I do not know if it is part of my Liverpool culture but when I see a wrong, I strive to change it. A role of government is to uphold the Rule of Law. Whilst we in Liverpool are supported by an excellent team of civil servants and judges at the Vernon Street courts alas, we cannot always litigate at home and so come across other court centres. When doing so, in many court centres, the delays in getting cases dealt with are intolerable and an embarrassment for the profession who have to try and explain them to our frustrated clients. Slow justice is no justice one might conclude. This committee will strive to understand the causes for the delays beyond Liverpool and see if they can be properly explained or *improved.* Also, *the recovery of legal costs by* successful litigants is becoming harder with *the expansion of fixed fees and the inability* to claim costs on the Small Claims Track. The committee will be keeping recoverability of legal costs under review.

I have been involved with the Liverpool law Society from my time as a trainee and have always valued the camaraderie that there is here in Liverpool. It is part of what makes Liverpool a great place to practice. Having been awarded Lawyer of the Year in 2013 by the society, I am now delighted to be able to give something back. It is an honour to have been asked."

This article cannot conclude without mention of the fact that Jonathan is a keen golfer and has Captained the Liverpool Law Golf Society where he still plays.

We wish him well for his term of office.



Leaders in Law: Emma Carey, Managing Partner at MSB Solicitors



1. Can you briefly explain your role as the Managing Partner and the key responsibilities that come with it?

As the Managing Partner, my main duties include overseeing the business development and financial stability of the firm. I am responsible for managing the growth and expansion of the company, as well as the management of our firm's partners.

2 What are the positive and negative aspects of being the Managing Partner?

The transition from being a lawyer to a business leader can be challenging. It requires acquiring new skills and knowledge outside the legal domain, and the responsibility of driving the firm's success can be overwhelming at times. Despite these challenges, the role offers a unique blend of intellectual stimulation and leadership opportunities. It allows you to shape the direction of the firm, build a strong team and contribute to the growth and development of the organisation. It is a role that requires a wide range of skills, a strategic mindset, and the ability to navigate complex business landscapes.

Overall, the positive aspects far outweigh the negatives – there's so much positive energy around taking a firm you're genuinely passionate about forward and growing it.

3. How has the COVID-19 pandemic impacted the operations of your firm?

One significant change we made in response to the pandemic was transitioning to a paper-free system, which I am personally very passionate about. This move has not only been beneficial for the environment but has also allowed us to streamline our operations. In addition to going paperless, remote training has also presented new opportunities for professional development within our firm.

4. What are your new agile working policies as a result of the pandemic and why?

We have introduced a hybrid home working policy across the entire business. This policy ensures an equitable workplace, providing our employees with flexibility and the ability to work from home up to two days a week.

We also recognise the importance of face-to-face time and encourage our team members to spend as much time as they can in the office. Our goal is to create an office environment that people genuinely want to be a part of, offering collaboration, mentorship and a sense of community.

5. What do you perceive as your greatest challenges?

The cost-of-living crisis has had an impact on our business, workforce, and team. It's essential for us to protect our employees as much as possible. As a legal aid provider, we are proud of the services we offer, but the government's refusal to increase the legal aid rate poses significant challenges.

6. What aspects of your firm are you most proud of?

There's so many things I'm proud of at

MSB, but one particular area of pride is the introduction of our ESG committee, which comprises several sub-committees focusing on promoting diversity in the workplace. We have worked hard to foster a diverse workforce, creating a supportive environment where everyone can be proud and comfortable being themselves. We are also proud of our high retention rate among staff and the fact that 33 of our lawyers were trainees within the firm, including myself. Investing in the next generation of talent is crucial to us and it's something we'll continue to do.

7. What are your immediate shortterm goals for the firm?

Our priority this year is to honour the two team members we have sadly lost to cancer, **Wendy Eves** and **Marie Carden**, keeping their legacy alive through fundraising for cancer support. We'll also be looking at how we support the next generation of lawyers, as this is something Wendy felt so passionate about.

8. Where do you envision the firm in ten years?

Our North West-based firm is determined to not only strengthen our existing presence, but also extend our reach nationally. With a clear strategic vision, we aspire to emerge as a prominent and well-respected national player in the legal industry. Building upon our solid foundation, we aim to establish ourselves as the go-to choice for those seeking exceptional legal services, while fostering long-term relationships with clients across the nation.

9. What kind of legacy would you like to leave as the Managing Partner?

I strive to ensure that MSB Solicitors is recognised as an equitable workplace where everyone feels comfortable and valued. Creating an inclusive environment is an absolute priority for us.



Leading North West Family Lawyer joins JMW Liverpool



Beverley Jones, Pauline McNamara and Ruth Kearns

One of the North West's best-known names in family law has joined the Liverpool office of leading full-service law firm JMW Solicitors.

Pauline McNamara comes to JMW from MSB Solicitors, a move which reunites her with partner and Head of Family Law, Liverpool, **Beverley Jones**. The pair worked together at Fletchers Solicitors almost 20 years ago and again later at DWF.

Manchester-based JMW caused something of a stir in the Liverpool legal sector in 2018 when it persuaded the entire DWF family law team, led by Beverley, to join its newly established base in the city.

It proved to be an astute move, with year-on-year growth and the most recent annual revenues for the office £1.2m, up from £955,000 in the previous year. The team recently won Family Law Team of the Year at the Liverpool Law Society awards at the end of 2023.

Beverley said: "Pauline's expertise and unrivalled reputation as a leading family lawyer will only add to our offering. I've known her a long time: she trained me at Fletchers, and we went on to work together at DWF.

"She's a strong negotiator who is highly experienced in high net worth divorce settlements, including valuation of businesses and complex pension and tax issues.

"I am thrilled that things have now come full circle and we will be working together once again."

Pauline added: *"I'm very excited to be joining Beverley and the team at JMW. It's great to have a new challenge, and to be working with an award-winning team. I can't wait to get started."*



Fletchers acquires Serious Injury Law



Fletchers Group, which has offices in Liverpool and Southport, has acquired serious injury specialists Serious Injury Law Ltd.

Bolton-based Serious Injury Law was founded in 1989 and has built an enviable reputation as a leader in representing clients who have sustained severe injuries, achieving numerous multi-million-pound settlements and earning top tier status from Legal 500.

The practice, which also has a strong proposition in court of protection and clinical negligence, is led by equity partners Tim Walters, Matt Dixon and Ben Priestley.

The Serious Injury Law team will become part of Fletchers Group and the Serious Injury Law brand will be retained, as will the offices in Bolton and Cambridge.

The integration is likely to be completed by 1st May, with Caroline Morris, Fletchers' Director of Serious Injury, taking overall responsibility for the combined serious injury team. Kate Edwards, Fletchers' Director of Private Client, will lead the court of protection team, and the clinical negligence lawyers will become part of the wider Group clinical negligence team.

Fletchers Group CEO Peter Haden said the acquisition strengthens the Group's presence in the North West, creates a clear leader in the field, and brings together two teams with highly complementary relationships and capabilities.

"This is an important deal for us, in that it reinforces our leadership in serious personal injury and underscores our strategy to strengthen the Group by acquiring exceptional law practices with excellent reputations. The combination of our existing serious injury practice with our new colleagues from SIL will create the strongest team in the sector, and we are particularly excited to invest behind the reputation and relationships that Tim, Matt and Ben have developed over recent years.

"Just as importantly, they share our values in terms of practice excellence, integrity and the privilege of client service. There is no doubt there's lots we can learn from each other, but we start from the same place on the things that matter most."

Commenting on the deal, Tim Walters said:

"Consolidation in the serious injury market is" gathering pace thanks to a wave of reform and subsequent changes to business models which reflect the emerging market landscape. It quickly became clear during our discussions with Peter and the team that combining our team with Fletchers represented the best possible future for our brilliant lawyers, support staff and our clients.

"Becoming part of a bigger Group will give our colleagues many more development opportunities and we are excited by the potential for Fletchers to help accelerate our plans for growth. We strongly believe we share a very similar culture and set of values, which will be important as we aim to ensure a smooth integration."

Fletchers Group was acquired by an affiliate of investment firm Sun European Partners, LLP in October 2021 and since then has added Cycle SOS, Minton Morill, Emsleys' PI division and Blume, one of the sector's leading providers of high-quality personal injury and clinical negligence work, to its business portfolio.



Carpenters Group enters 30th year in style at the ILC Motor Claims Networking Lunch



As I'm sure most of the industry does, the Carpenters Group team were very much looking forward to the ILC Motor Claims Networking lunch which takes place every January.



This year felt a little different though as Carpenters Group enters its 30th year anniversary!

We were surprised (and delighted of course) to find bottles of champagne on our fantastically decorated tables courtesy of the lovely ILC team. With the corks popped, we raised glasses with our wonderful guests to both welcome the start of our 30th year and to also pay tribute to the memories of **Bob Linwood** and **Dane Loosley**.



With **Sue Whyte** at the helm, the ILC lunch got off to a fantastic start as Sue shared news about the industry, the plans for the ILC team in 2024 and the stacked calendar of events coming our way this year.

RAINBOW TRUST SUPPORTING FAMILIES WITH A SERIOUSLY ILL CHILD

It was great to hear how this years event raised £60,000 for children's charity Rainbow Trust and **Zillah Bingley** explained how important this was to the charity and how the children benefitted from the donations. We love supporting the brilliant Rainbow Trust charity, so much so that our Chairman, **John Carpenter**, and Director, **Donna Scully**, bought a teddy each to support the charity.

The day always flies-by with countless conversations with our own guests and the industry legends that attend this event. We even celebrated Carpenters 30th anniversary with another round of drinks on the train back to the North West.

We are already looking forward to attending next year...

Paul Challoner,

Commercial Director Carpenters Group



International M&A specialist joins O'Connors



Yousra Gamgoum

Liverpool and London-based business lawyers and advisers, O'Connors, has appointed international M&A specialist, Yousra Gamgoum as an Associate in its legal team to broaden its international support for clients. Yousra is an experienced corporate lawyer, dual qualified (England & Wales and Egypt) who joins from one of the leading commercial law firms in Cairo, where most of the transactions she handled were valued at over 100 million US Dollars. She is fluent in Arabic and English.

Yousra's experience of handling complex global and cross-border transactions aligns with the firm's objective of supporting clients, wherever in the world they are doing business. Her work advising major private equity funds and institutional investors will also add breadth to the firm's specialist sector work assisting those establishing new investment funds.

Yousra said: "The team at O'Connors has welcomed me so warmly and gone the extra mile to make my move from Egypt as smooth possible. I chose O'Connors because of its special team culture and its unique blend of corporate, commercial, insurance and regulatory expertise. I believe my experience will assist the firm in providing wider support to organisations engaged in global expansion and in offering their alternative legal project management model to even more large corporates".

Commenting on Yousra's appointment, director **David Malone** said: "Yousra is another key strategic appointment for us as we continue to develop our team for the future. Her heavyweight transaction experience adds further depth to our growing team. With our Certificate of Sponsorship now in place, we see international recruitment as an additional way of bringing new and exciting skills to the firm, for the benefit of our clients".

O'Connors was founded in 2003 and comprises more than twenty senior lawyers and support staff, bringing together best of breed teams to help clients achieve remarkable and longlasting success.

New family law barrister joins the team at MSB



Rachael Banks

Leading North West law firm MSB Solicitors has expanded and bolstered its Family Law team with the appointment of Rachael Banks, who joins as a Barrister.

With a distinguished career spanning over 30 years, including 9 years at St John's Buildings Chambers, Rachael brings a wealth of experience and expertise to the team. Prior to her time at St John's Buildings Chambers, Rachael spent 17 years at Atlantic Chambers, honing her legal skills and building a solid foundation in family law.

Throughout her career, Rachael has developed a passion for family law, particularly in representing vulnerable individuals. Her focus lies in assisting clients with divorce, relationship breakdown and all aspects relating to the separation of couples. She also represents families involved with public law proceedings. She finds great satisfaction in supporting people during one of the most challenging times of their lives and believes in seeking to make a positive impact during these difficult periods.

Rachael Banks, Barrister at MSB Solicitors, said: "*My decision to join MSB was motivated by the exciting opportunities the firm offers. Having worked closely with the* business for many years, I'm so excited to take on new challenges and contribute to a dynamic and thriving organisation."

As she joins MSB Solicitors, Rachael is most excited about continuing to specialise in family law. She thrives on the diversity of each day and looks forward to being part of a large team that collaborates seamlessly.

Under the leadership of **Emma Palmer**, Rachael is confident that the team at MSB will continue to deliver outstanding service to its clients.

Emma Carey, Managing Partner at MSB Solicitors, commented, "We are thrilled to welcome Rachael Banks to our team of skilled advocates. Her extensive experience and passion for family law make her a valuable addition to our firm. We are confident that Rachael will drive positive outcomes for our clients and contribute significantly to our continued success."



Maria Fogg Family Law Shortlisted for Boutique Law Firm of the Year at Modern Legal Awards 2024



Maria Fogg Family Law is proud to announce its shortlisting for the esteemed title of Boutique Law Firm of the Year at the highly anticipated Modern Legal Awards 2024. This recognition underscores the firm's commitment to excellence, innovation, and client-focused service in the field of family law.

The Boutique Law Firm category seeks to honour firms that specialize in niche areas of law while demonstrating exceptional performance across various aspects of business development. Maria Fogg Family Law has been acknowledged for its outstanding achievements in meeting and surpassing the rigorous criteria set forth by the judging panel.

Specializing exclusively in family law matters, Maria Fogg Family Law has earned a reputation for providing expert legal counsel and support in matters such as divorce, child custody, financial settlements, and domestic abuse. The firm's team of dedicated solicitors brings a wealth of experience and expertise to every case, ensuring that clients receive the highest standard of representation and care.

Over the past year, Maria Fogg Family Law has achieved significant growth and development as a business, prioritizing strategic expansion, financial performance, and employee development. Despite its boutique size, the firm has demonstrated its ability to compete effectively with larger, multi-practice firms through innovation and a commitment to exceeding client expectations.

Maria Fogg Family Law takes pride in its culture of diversity and inclusion, both within the firm and in its approach to client service. The firm recognizes and respects the unique needs and circumstances of each client, offering tailored solutions and unwavering support throughout the legal process. The winners of the Modern Legal Awards will be announced at a ceremony in London on the 7th of March 2024. Maria Fogg Family Law eagerly anticipates the opportunity to celebrate alongside fellow nominees and industry leaders.

"We are truly honoured to be shortlisted for Boutique Law Firm of the Year at the Modern Legal Awards 2024. This recognition reflects our unwavering commitment to excellence, innovation, and client-centric service in the field of family law. At Maria Fogg Family Law, we are dedicated to achieving the best outcomes for our clients, and this nomination further validates our efforts. We extend our heartfelt gratitude to the judging panel for considering us for this prestigious accolade, and we look forward to continuing to serve our clients with dedication and integrity"

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Unit Chambers and Complete Counsel Collaborate to Elevate Client Experience



Claire Labio and Lisa Edmunds

Unit Chambers is proud to announce a new partnership with Complete Counsel, a leading provider of backoffice chambers support services, aimed at enhancing client satisfaction through improved support capabilities.

This collaboration, overseen by **Lisa Edmunds**, Head of Unit Chambers and **Claire Labio**, Founder at Complete Counsel, signifies a joint effort between two Liverpool-based businesses to address a gap in the market and meet the evolving needs of clients and barristers. Claire brings over 24 years of experience working within traditional chambers models and as a result, now recognises the importance of finding proactive solutions within the legal services landscape.

Unit Chambers welcomes this collaboration as a vital step towards their ongoing aim to strive for operational excellence and client satisfaction. As part of this initiative, two highly experienced professionals join the team: **Helen Southworth**, who has over 32 years of expertise as a Fees Clerk at St John's Buildings and **Emma Wall**, with 18 years of experience as a family clerk at the same institution.

Lisa Edmunds, Head of Chambers at Unit, affirms the commitment to delivering unparalleled support and service excellence: "Our collaboration with Complete Counsel marks an exciting milestone in our commitment to delivering exceptional service and support to our clients. By joining forces, we aim to set new standards of excellence in the legal profession, particularly within family law, ensuring that our clients receive the best possible representation and care."

Claire Labio, Director of Complete Counsel said, *"We are delighted to have reached this agreement with Unit Chambers. It is an exciting step for both firms, driven by a desire to continue to*

provide the best clerking services in the sectors within which we operate. We have a shared vision of the 21st Century Bar. We founded Complete Counsel with a desire to disrupt the Bar and challenge the traditional way of working. The fact that we can now assist other sets with their clerking shows how flexible the model truly is. Unit Chambers will benefit from our comprehensive backoffice support and the expertise of our clerks, as our current set of barristers continue to enjoy. I believe our combined efforts will drive further growth and deliver stronger client and sector offerings for both firms."

Unit Chambers and Complete Counsel look forward to advancing together, maintaining the highest standards of representation and care for clients across the realm of family law.

For further inquiries or information, please visit <u>www.unit.law</u> or contact the team on <u>engage@unit.law</u>.



Brabners Family Team Accolade



The family team at Brabners is pleased to have been recognised

as 'The Best Place to Work' at the British Family Law Awards 2024.

This follows the firm's recent accolade of being the best law firm (and the 11th best large company) to work for in the UK by Best Companies.

The British Family Law Awards ceremony was hosted at The Harbour Hotel in Bristol. The ambition of the awards is to recognise and celebrate excellence in the family law community across England and Wales.

Leanne Instrall (Legal Director, Brabners) says: "We are so proud to have received this award. Brabners puts its people at the heart of everything we do — and we all stand together to do what's right. For so many reasons, this really is a great place to work".

Jayde Hampson Brabners



Training Seat Exchange

Liverpool Law Society operates a free, online noticeboard whereby firms explain what seat(s) they can offer and also what seat(s) they are seeking. Open only to members of Liverpool Law Society, it is a way of assisting member firms interchange trainees who may otherwise find it difficult to offer their trainees a suitable breadth of work. The aim is to provide more training contracts in Merseyside and beyond.



Currently from <u>Phoenix Legal</u> <u>Solicitors</u> we have: Seats Offered: Medical Negligence; Personal injury; Landlord & Tenant Seats Sought: Family; Commercial; Conveyancing; Wills & Probate

Training Seat Exchange

providing more training contracts in Merseyside and beyond





Transparency in the Family Court



The Reporting Pilot launched in Liverpool on 29 January 2024. This follows existing pilots in Cardiff, Leeds, and Carlisle. The rollout in Liverpool is currently limited to public law proceedings but will extend to private law proceedings in the future.

The pilot gives a general right of attendance to journalists and legal bloggers. Where a pilot reporter attends a hearing, the Court will consider making a Transparency Order to permit reporting and the terms of this.

What concerns might clients have and how can they be addressed?

"I don't want them here!"

It is at the discretion of the Judge as to whether the pilot reporter can attend all or part of the hearing. Advocates and parties can make submissions to the Court and the reporter will have the opportunity to respond. The Court will exclude a reporter only if necessary in the child's interests, for the safety of a party or witness, for the orderly conduct of proceedings, or in the interests of justice. The Court may restrict what details the pilot reporter publishes.

"I don't want my child in the press!"

Pilot reporters must maintain the anonymity of the children and are subject to strict rules about the details they can report.

Clients should be warned that they must not like or repost any articles about their case as this would identify their children and they could be found in contempt of court.

"Do they know what they're doing?"

Only accredited journalists and legal bloggers can report hearings. Journalists must have a UK press card. Legal bloggers must have a practising certificate or letter from their academic institution or registered educational charity and provide notice in form FP301.

"Can I speak to them?"

Parties can invite pilot reporters to attend a hearing. Pilot reporters can interview the parties and have copy of documents prepared for the hearing by the advocates / litigants in person. Pilot reporters can apply to the Court to see other documents in the case. They can quote from the parties and documents provided.

"What if I don't like what they say?"

The pilot reporter can publish what they like within the procedure rules and terms of the Transparency Order. The

Court cannot exert what is akin to editorial control over journalistic material.

Practitioners may also be concerned about the quality of reporting. Pilot reporters from a journalistic rather than legal background will understandably lack knowledge of the legal framework and court process and without full information risk misrepresenting the case. In the age of social media clickbait looms large.

However, the press can already discuss anonymised judgments from the higher courts. The pilot opens up the family court where the bulk of cases take place and where there is most to be gained from wider public knowledge and scrutiny. Reporting invites discussion and who knows? There may be an opening for a new Secret Barrister (Family Law Edition).

Holly Knowles

(Trainee Solicitor at MSB Solicitors and MJLD National Representative)



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Liverpool LawSociety

The Grand Legal Expedition: Charting the Uncharted with ChatGPT-4, Our Digital Drake

In this splendid era of technological marvels and digital wonders, where the quill has gracefully bowed to the might of the keyboard, and the dusty tomes of yore have given way to the sleek screens of tablets, we, the proud custodians of British jurisprudence, find ourselves on the cusp of a new and thrilling voyage. Yes, my fellow legal explorers, I speak of none other than the advent of ChatGPT-4, a veritable Sir Francis Drake of the digital age, ready to circumnavigate the vast oceans of legal information with the ease of a seasoned navigator.

Behold, Our Digital Companion in the Quest for Legal Enlightenment

Before we set sail on this grand expedition, let us acquaint ourselves with our formidable ally, ChatGPT-4. Imagine, if you will, a creature born of the loins of technology, endowed with the intellect of a thousand clerks and the wisdom of countless legal volumes. This digital behemoth, trained in the arcane arts of algorithms and machine learning, stands at the ready to assist us in our noble quest for justice and efficiency.

The Versatile Roles of ChatGPT-4 in the Legal Firmament

1. The Keeper of the Legal Lexicon With a mere flick of the wrist (or, more accurately, a tap of the finger), ChatGPT-4 can summon forth the essence of legal precedents, statutes, and doctrines, presenting them with the flourish of a court jester but the accuracy of a Beefeater. This digital librarian, tirelessly sifting through the annals of legal history, offers us the keys to the kingdom of knowledge, without the inconvenience of dust or the tyranny of physical space.

2. The Artisan of Legal Draftsmanship

The drafting of legal documents, a task once fraught with the peril of carpal tunnel and the monotony of repetition, is now reimagined as a delightful collaboration with our digital Drake. ChatGPT-4, with its quiver full of legal phrases and clauses, stands ready to transform our nascent thoughts into fully-fledged documents, as if by magic, allowing us more time to ponder the great mysteries of the law (or perhaps to enjoy a well-deserved cup of tea).

3. The Oracle of Client Communication

In the realm of client relations, where clarity and precision are the jewels in our crown, ChatGPT-4 emerges as a master wordsmith, crafting correspondences that bridge the gap between legal jargon and the King's English. This digital envoy ensures our messages are not only received but understood, with the grace and finesse of a Shakespearean sonnet.

4. The Mentor of Legal Lore

For those of us embarked on the lifelong journey of learning, ChatGPT-4 serves as a sage, imparting wisdom on matters both arcane and mundane. This digital Aristotle can elucidate complex legal theories, recent judgements, or the latest regulatory changes, all without once resorting to the lash or the dull thud of a chalkboard.

5. The Strategist in the Shadows

In the chess game of legal strategy, where foresight and cunning dictate the victor, ChatGPT-4 offers its services as a grandmaster, analyzing patterns and predicting outcomes with the cool detachment of a Spassky or a Kasparov. Armed with this digital soothsayer, we can navigate the murky waters of legal disputes with the confidence of Nelson at Trafalgar.

Navigating the Ethical Maelstrom with Our Digital Companion

As we embrace the boundless possibilities of ChatGPT-4, let us not lose sight of the compass of our professional ethics, steering a course true to the principles of confidentiality, accuracy, and transparency. Like the great explorers of yesteryear, we must chart these waters with care, ensuring that our digital endeavours enhance, rather than diminish, the noble calling of the law.

1. Guardians of the Sacred Trust

In our use of ChatGPT-4, let us be ever vigilant, encrypting our data as if they were the crown jewels, and treating every piece of information with the reverence it deserves. Our clients' confidences are sacrosanct, a trust as inviolable as the Tower of London.

2. Purveyors of Truth

Though ChatGPT-4 may whisper sweet legal nothings into our ears, let us remember our duty to verify and validate, cross-referencing its pronouncements with the sacred texts of law. In this age of information, let us be the beacon of accuracy and reliability, guiding our clients with the steady hand of expertise.

3. Ambassadors of Transparency

As we deploy our digital Drake in the service of our clients, let us do so with the flag of transparency proudly unfurled. Let our clients know that in this brave new world, their legal champions are augmented by digital prowess, yet always guided by human wisdom and judgement.

In Summation: A Toast to Our Digital Future

And so, my esteemed colleagues, as we stand on the brink of this digital dawn, let us embrace ChatGPT-4 with the spirit of adventure that has always defined the British legal profession. Together, with our digital compatriot at our side, we shall navigate the uncharted waters of the future, ever vigilant, ever ethical, and ever committed to the service of justice. To the future, to the law, and to the enduring partnership of man and machine!

Onwards!

Kind regards Charles Peter Managing Director Berkson Family Law



LJMU School of Law event on 'Overcoming challenges when entering the Legal Profession' promoting social mobility is an enormous success



Panellists' and guest speakers networking with LJMU School of Law students and enjoying the Judicial Office Supreme Court Exhibition of Trailblazing Women in the Law, currently hosted by LJMU School of Law.

On Monday 5 February LJMU School of Law hosted an event on 'Overcoming challenges when entering the Legal Profession.' The purpose of the event was to hear from several legal professionals about their story of entering the legal profession, any challenges they faced and how they overcame them. The panel included HHJ Leona Harrison, Indunee Seneviratne (Barrister at Oriel Chambers), Jack Barber (Pupil Barrister at Deans Court Chambers), Tracy Etienne MBE (HMCTS), Dan Longman (Diversity and Community Relations Magistrate), Rebecca Fitzpatrick (Browne Jacobson) and DJ Natalie Cuddy.

The panel provided real insight into not just the challenges of entering the legal profession, but also the progress that is already being made with regard to social mobility, equality, diversity and inclusivity.

Students from LJMU School of Law were also provided with the opportunity to network with the panellists and the following guest speakers: **Alum Ullah** (Bond Turner), **Jennifer Powell** (Weightmans LLP), Employment Judge **Dawn Shotter**, Regional Tribunal Judge **Rosemary Lloyd** and **Paul Doran** (LJMU School of Law). This enabled students from LJMU School of Law to ask any pressing questions they may have and to gain further insight in succeeding in the law.

Beverley Caddick-Kala, Subject Leader in Law, stated that "it was inspiring to see so many legal professionals come together to share their experience and provide support to the future generation of legal professionals. This event would not have taken place without the support from our panellists and guest speakers who gave up their time to share their experiences. It was wonderful to see how many of our students left feeling inspired and positive about their future careers in law."



Students were also guided through placement opportunities with HM Courts & Tribunals Service (HMCTS) and received first-hand knowledge on how to secure scholarships to study at the Bar and training opportunities at Browne Jacobson.

Professor **Carlo Panara**, Director of the School of Law also added, "I am grateful to my colleague Beverley Caddick-Kala for bringing such high profile speakers to LJMU's School of Law and to the speakers for sharing their wide ranging experience with our students. This event is an example of our focus on and dedication to the employability of our students."

This event also celebrated the Judicial Office Supreme Court Exhibition of Trailblazing Women in the Law, that LJMU School of Law is currently hosting. The exhibition features judges and other woman pioneers in the legal profession over the past 100 years. The exhibition celebrates the centenary of **Ivy Williams'** achievement as the first woman to be called to the Bar of England and Wales in 1922.



Top row: Jennifer Powell, Paula Doran, Jack Barber, Employment Judge Dawn Shotter, Alum Ullah and Regional Tribunal Judge Rosemary Lloyd.

Bottom row: Rebecca Fitzpatrick, Beverley Caddick-Kala, HHJ Leona Harrison, Indunee Seneviratne, Tracy Etienne MBE, Daniel Longman and District Judge Natalie Cuddy.



Audience and Judicial Office Supreme Court Exhibition of Trailblazing Women in the Law, currently hosted by LJMU School of Law.



Sir Bradley's advice on how to succeed



Mollie Williams

I am a Trainee Solicitor for O'Connors Legal Services, currently undergoing a 3-month secondment at Bond Turner. O'Connors' expertise are within the Corporate, Commercial and Regulatory areas of law, all of which I have gained valuable experience in. Bond Turner on the other hand, undertake litigious work in the Group Litigation, Personal Injury, Clinical and Professional Negligence, Credit Hire and Housing Disrepair areas of law, of which I am in the process of learning more about, as a member of the Group Litigation Team.

Recently, Bond Turner welcomed **Sir Bradley Wiggins**, former professional cyclist for Great Britain. Bradley gave an insightful training session about how to overcome obstacles and succeed in your area of expertise, whether that be sports, law or anything else in between. As a Trainee, I am always looking to learn new skills and excel in my role, but this was not perhaps from a source I was expecting!



Sir Bradley Wiggins

Bradley discussed his life, achievements, and the struggles he has overcome in order to get to where he is today. The session was extremely inspiring, and my 4 key takeaways were as follows:

1. Be flexible when setting your goals.

Bradley achieved many victories throughout his cycling career, most notably, Olympic gold medals and winning the Tour de France. One of his tips for success is, not only to reach the goals you set yourself, but to exceed them and set greater ones. In order to maintain hunger and motivation for progression and success in your career, your "goals" should never be end goals, but simply stepping stones which should be acknowledged and celebrated, that will enable you to go further and better yourself. This mindset applied by Bradley in cycling, can be applied across the board. In the early days of your legal career, most trainees fixate on becoming qualified and this

becomes the main goal. However, the session made me realise that beyond qualification, you should not adopt the mindset in which you believe that your goal has been reached, as this is the only the beginning. Goals should evolve as your experience grows and Bradley is a shining example of this.

2. Don't let obstacles slow you down.

In 2011, during training for the Tour de France, Bradley suffered a broken collarbone and had to pull out of the race. However, only 6 weeks later he led Team Sky at the Vuelta a España, in which he finished third. Therefore, despite the setback Bradley did not allow this to slow down his momentum; obstacles are only as big of a problem as you allow them to be. For many people, setbacks and obstacles are perceived as failures and result in many individuals losing faith in their own ability. Bradley went on to have a remarkably successful 2012, in which he became the first British cyclist to win both the Tour de France and the time trial at the 2012 Summer Olympics, proving that with dedication and determination, obstacles can be overcome. From the perspective of trainees and those starting on their legal journey, I likened this to not succeeding in training contract applications, or not doing as well as hoped in exams. Following a rejection letter or disheartening exam results, the easiest option is to give up. But, as Bradley has proven, this is never the answer. Through perseverance and commitment, your goals are never too far away.

3. Maintain a balance.

When working towards goals and milestones, you can often feel as though you are in a life-or-death situation; like the world will end if something is not achieved or things go wrong. Nonetheless, when taking a step back and evaluating the gravity of the scenario, you tend to realise that there is much more to life and



the opportunity will most likely come again. Bradley demonstrated this when telling the group about his hand tattoos of his children's initials, which he would look at during tournaments as an escape mechanism, reminding him of what is really important. This mindset can be adopted in any career, with the clear message being that whilst success does require commitment and hard work, it is vital not to lose sight of the wider picture. As trainees, it is easy to slip into the mindset that nothing else matters, and whilst this feels like the right attitude, it is also important to not put too much pressure on yourself and maintain perspective.

4. Never be afraid of change- new challenges mean optimising your opportunities.

Despite Bradley's triumphant cycling

career, he has no intention of slowing down. New challenges present new opportunities, and for Bradley, he is eager to continue learning new skills, despite how daunting this might feel. Bradley is currently partaking in boxing training, with a view to competing in the near future, which is a stark contrast to any cycling race that he has previously taken part in. In addition to this, he also works with organisations like the NSPCC, where he supports and backs the "Listen Up, Speak Up" campaign. Both of these very different endeavours demonstrate that wherever you believe your talents and passions lie, you should always explore beyond this. It is never too late to expand your expertise and act on your interests. Upon reflection of his talents and achievements, Bradley acknowledged that there are always new paths to

be explored, and in doing so has maximised his potential, something we can all learn from.

The training session with Bradley opened my eyes as to the similar mindsets needed to achieve success in such different careers as sports and law. The session gave an insight into how you can optimise yourself and your opportunities, whilst also advising on how to deal with obstacles you might face throughout your journey. And of course, whilst I think this can be applied to all careers, I also think it applies to all aspects of one's life. I would like to thank Bradley for his motivational speech, that resonated with us all.

Mollie Williams Trainee Solicitor





Is your business ready for a Mystery Shop?

Liverpool BID Company

Our regular update from Julie Johnson, partner at Morecrofts Solicitors and chair of Liverpool BID Company's Commercial District BID operating board



Julie Johnson

When you picture great customer service, what are you imagining? Is it retail, or a hospitality venue, perhaps? In fact, the way we deal with our customers, whatever our business sector, is a vital ingredient in our success.

This Spring, Liverpool BID Company will launch a different kind of Mystery Shop Awards. We have long organised a Mystery Shop across the Retail & Leisure BID area, helping to measure customer service across retail stores, but now we are branching out. A new professional services Mystery Shop will help to measure how good our private sector businesses are providing a warm welcome and support.

What will we be looking for? Much like in the retail surveys, the mystery shop in professional services businesses will examine how the customer is treated. It will begin with how well the initial contact is supported, be that via phone or email. Each business will score based on four key areas; first impressions, speed of response, friendliness and how knowledgeable the team is in dealing with the inquiry.

Each mystery shop will create a bespoke report on each business and score, identifying key trends and inviting businesses to a feedback session so they can understand performances across sectors in the city.

Why is it important for us to understand how well our professional services businesses are at customer service? We can understand it from a retail perspective, because we know that good customer service helps to transform the retail experience. It helps us to find what we need to feel welcome and supported. It also can mean we spend more money in the store.

There isn't a great deal of difference in professional services. The way we interact with first time customers, especially those who come from a cold call or an email inquiry through our website can be incredibly important. First impressions matter, and it can help to define our professionalism, but also our future success as a business. There is a link between customer service, commercialisation and repeat custom for all businesses.

It can provide valuable insights for businesses to understand how well those initial enquiries are dealt with, and how far the frontline services and customer facing support is impacting how a business is both perceived and its performance. Every business wants to believe they have no issues, but a Mystery Shop can be a very effective way of rooting out any problems which might be impacting on success.

Every business has some form of customer service, whatever industry we work in. How we welcome those customers, how we make them feel and how we present our specialists and expertise can transform their experience, and have a direct impact on how well our business performs.

The Mystery Shops will begin in April and May with over 100 businesses in Liverpool being engaged with. The results will be published in June.

RATHBONES

IT'S GOOD TO TALK

If approached in the right way, family get-togethers can present a great opportunity to discuss your financial plans.

Conversations about money are rarely straightforward, particularly when they involve family. Your financial plans could be an area of strong debate, where different emotions, values and expectations collide.

Take advantage of family time to discuss financial plans

Discover how family gatherings can form an essential part of your financial planning in our handy guide or get in touch to find out how we can help you.



The value of investments and income arising from them may fall as well as rise and you might get back less than you originally invested.

Rathbones Investment Management Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.



Liverpool Law Society Directors meeting with Liverpool City Region Local Authority Representatives

It can be so easy, especially during a bitter and blustery January, to feel disheartened seeing and hearing news of geo-political events, wars and even injustices closer to home, popping up on our TV screens and phones. Feeling that there is very little each of us can do is common, perhaps particularly so for those in the legal industry who may have joined this profession to try to play one small part in improving the lives of others. Can the individual contributions of those in our profession make this difference? Well, that is a big question to answer but it was certainly on the minds of the directors of the Liverpool Law Society who attended a meeting with representatives of local councils in our region, raising some important issues with them facing clients of lawyers and lawyers themselves, particularly around access to justice themes, with hopes to bring about change.

Present from local authorities was **Cllr. Jane Corbett** (Liverpool), **Jan Bakewell** (St Helens Council), **Mark Reaney** (Solicitor and Director of Legal and Democratic Services at Halton Council) and **Vikki L Shaw** (rep **Cllr. Jan Williamson** – Wirral) and **Emily Spurrell** – Police and Crime Commissioner.



Sarah Mansfield of Cullimore Dutton, Deputy Vice President of Liverpool Law Society, gave an update on issues in the housing sector. The **Renters' Reform Bill** is with the House of Commons and the government announced last October that the abolishment of section 21 no fault evictions would only

occur when "sufficient progress has been made to improve the courts." The commitment to prioritise the court process over section 21 came slightly unexpectedly and is likely due to discontent among landlords. In place of section 21, the bill outlines proposals to strengthen section 8 assured tenancy grounds and has an ambition of a single system of periodic tenancies, where landlords would only be able to evict a tenant under "reasonable" circumstances. Michael Gove has since appeared on television suggesting that section 21 will be abolished before the UK General Election, but no further details were provided. Separately, with welcome news for animal lovers, tenants are to be given more rights to keep pets in properties.

Next on the agenda was access to justice. Liverpool is reaching a crisis point with a huge need for housing advice

and assistance but with an ever reducing number of firms and agencies that offer legal advice and assistance. This has been caused mainly due to lack of legal funding for advice prior to court action being commenced so the opportunity to tackle a problem prior to court intervention is increasingly unlikely. Coupled with the impact on people who leave prison where there is not a requirement on local authorities to house them and that the reported waiting time to be housed by the council in Birkenhead is 74 weeks and Liverpool 79 weeks, there is need for improvement.



Similarly, Liverpool Law Society director **James Mannouch** reported on Vauxhall Law Centre. Lack of funding is critical, and the Centre is operating on very few resources meaning it has had to close for new cases to manage capacity. The Centre will work through December 2023 enquiries and

existing clients but will deal with emergency only enquiries during January and February this year. Merseyside Law Centre are open but simultaneously staffing the housing possession duty solicitor scheme alongside James Murray Solicitors and Shelter. This is understood to be on a temporary basis. There is reluctance from other firms and agencies to agree to a permanent contract as the funding offered is inadequate. Where local authorities can provide emergency funding, it will be welcomed, especially as a lack of housing can lead those effected to further problems in the future such as debt and effects on mental health. **Councillor Corbett** (Liverpool City Council) asked **James** to provide her with some further statistics and information on the lack of funding for providers of housing advice.



John-Paul Dennis of Prosperity Law and Liverpool Law Society Director spoke about the delays at the Probate Registry, Land Registry, Court of Protection and Senior Courts Costs Office, which appears to be caused by a lack of investment and fewer staff. Technology has been implemented to assist but

in practice seems to have led to further delays. Not only does this impact the members of the public needing to use these services but this directly effects solicitors too, who struggle to recover fees and cannot sustain their businesses which in turn limits access to legal advice for the public. The meeting also discussed the problems with the roof at Sefton Magistrates Court which has meant it has had to close several times. **Emily Spurrell**, Police and Crime Commissioner offered to raise this in her next meeting with HMCTS.

We also talked the attendees through some of the key bills currently going through parliament.

The **Safety of Rwanda (Asylum and Immigration) Bill** recently cleared the House of Commons and is now to be considered at the House of Lords. The bill aims to revive plans to send asylum seekers to Rwanda. The UK Supreme Court ruled unanimously last year that Rwanda was not a safe country to remove asylum seekers to. There has been some commentary in the press that the bill will work to stop further argument in the courts that removals to Rwanda are unlawful, which raises questions on whether it is in accordance with the UK's human rights obligations. The Law Society of England and Wales has published a briefing note that the bill undermines the rule of law, the role of our independent judiciary and our country's crucial constitutional balance of powers.

The Post Office inquiry has been making many headlines, spurred by the ITV drama "*Mr. Bates v The Post Office*" which aired this month. The **Post Office (Horizon System) Compensation Bill** relates to the payouts due to those exposed to the Horizon IT scandal and lifts the arbitrary deadline of 7 August 2024 for payment of compensation.

The Economic Activity of Public Bodies (Overseas Matters) Bill looks to ban public bodies from imposing their own boycotts, divestment, or sanctions campaigns against foreign countries. Commentary in the press suggests the policy background behind the bill is the rise of the Boycott, Divestment and Sanctions movement which campaigns against investment in and engagement with the State of Israel.

The **Criminal Justice Bill** is one of three pieces of legislation announced in the King's Speech focused on criminal justice. The bill's provisions include powers to compel attendance at sentencing hearings, something which became topical in the press during the **Lucy Letby** trial, and the transfer of prisoners to foreign prisons. There has been commentary in the press on plans to criminalise the act of people sleeping rough which is relevant in light of the housing crisis highlighted above. There is also an intention for there to be an introduction of a *"duty of candour"* on the police, which comes following the Hillsborough inquiry. Other criminal law bills include the **Sentencing Bill** and **Victims and Prisoners Bill**.

Of note is the **Data Protection and Digital Information Bill** which is to become part of the UK's data protection regime and, amongst other matters, will amend UK GDPR. This will be of relevance to anyone processing personal data, including public authorities and other bodies. In a written Ministerial Statement of 8 March 2023, **Michelle Donelan**, then Secretary of State for Science, Innovation and Technology said the new bill followed a detailed codesign process with industry, business, privacy and consumer groups and would *"create a new UK data rights regime tailormade for our needs"*. Some commentators have questioned if the bill will weaken important data protection rights and safeguards by reducing transparency on use of personal data.

The councillors attending lamented the expected cuts to funding that they anticipate, particularly in light of their upcoming budgets being set.

We thank the local council representatives for listening to what the lawyers on the ground are experiencing and taking on board our hopes for change and if you feel there is a legal-related issue that you'd like the Liverpool Law Society directors to raise with MPs and local councillors, do get in touch.

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Kind regards Lauren Cannon (she/her) Director and Co-Founder



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Liverpool Law Society

EDI Committee Meeting 31/01/24

In preparation for LGBT History Month, we were honoured with the presence of the amazing Amanda Hilton – a Senior Chartered Legal Executive at DAC Beachcroft, who transitioned during her time at the company. Amanda is also a Trustee of the Liverpool Pride Foundation and Co-Chair of LINK North and also of Spectrum (which is the voice of LGBT employees at DAC).

Amanda was effusive in expressing how fortunate she was to work in such an accepting place. She acknowledged that a lot of the acceptance and understanding was from her clients; as Diversity and Inclusion was already a key aspect of the Insurance industry. Several of her clients were some of the largest Insurance Companies in Europe; which are very very progressive and have a huge insurance sector. As such, Amanda fortunately had no issues with her clients regarding this life-change. However, she was the first employee in DAC to have undertaken this process, so she admitted that it was a case of the blind leading the blind with regards creating and implementing a transgender policy, but she is proud of their progress.

Amanda also shared information about the transition process; including timescales and cost. Amanda admits that she was much more fortunate than other people wishing to transition, as she was in the financial position to enable her to undertake the medical transition privately, rather than having to wait to go through the NHS. There is a 7 year waiting list (of over 30,000 people) for the Gender Identity Unit on the NHS, so it can be some 4 years for an initial appointment.

She started the process of medical transition in late 2019/2020, which (paying privately) took her around 2 years and cost her not shy of £20,000 (although the surgery alone would now be north of £25,000).

The process is no-where near as swift and straight-forward as the media is presently trying to portray, which Amanda kindly provided a breakdown to clarify the requirements and steps, which include:

- Diagnosis of Gender Dysphoria by both a psychiatrist and endocrinologist
- GP approval
- One year on hormones (which results in the body going through a massive hormonal change – with a significant emotional impact)
- Double sign-off from two further psychiatrists
- These steps all have to be undertaken before you can be authorised to undergo surgery.

Amanda was then kind enough to answer several questions from numerous members of the Committee. The most relevant to readers of this magazine would be in respect of with regards how the legal sector deal with the transgender issue. Amanda agreed with the person asking the question; that the legal sector seems to be more behind the times than other industries regarding this issue. She reiterated that the Insurance Sector already have an infrastructure built in, they are very progressive and DEI focused; but the information and support she gained whilst working with them allowed her to assist her company in building their Transgender Policy. Amanda accepts that she was privileged; both in respect of the acceptance and support of her employer, and in respect of her financial position allowing her to deal with the transition process privately rather than the NHS.

Amanda declared that in order to give the best at your job, you need to be the best you can be; which ultimately means being yourself. Working at a safe and supportive firm allowed her to do this, which has benefited her employer. Hopefully this example may inspire other firms. After Amanda finished her talk, the Committee discussed their hopes of holding another event in May and inviting members to put forward their ideas in respect of the same.

Nicholas O'Neill provided an update in respect of the Merseyside Men's Legal Wellbeing Group; which takes place over Teams on the last Friday of every month. He said that he had been blown away at the engagement and openness of those involved and he hopes this will continue to grow and possibly allow for in person sessions in future. To find out more or to sign up, please email <u>legalmenswellbeing8@</u> gmail.com

We then discussed future Training being offered by Liverpool Law Society; the next session being Personal Branding for Women Lawyers; an online session to take place on 05/03/24, in preparation for International Women's Day.

Finally, we shared what our firms are doing in respect of LGBT History Month. The majority are focused in sharing information via their internal Intranet to raise awareness. We would be very interested if other firms would be prepared to share what they will be doing.

Our next meeting will take place in March, when we will be fortunate enough to have District Judge **Sheren Guirguis** in attendance to speak about her experience as a female Judge as well as the process barristers and solicitors can become Judges; with the hope of expanding the diversity of people acting as Judges.

Amy Planche, Carpenters and EDI Committee Member



Book Review



Jenna Ellison

Jenna Ellison, Head of Family Law at Burd Ward Solicitors has had a text book published. The text book is aimed at CILEX students, but is available for all to purchase: Working in Family Practice 1st edition | 9781911713128, 978-1-911713-13-5 | VitalSource

Working in Family Practice begins by introducing some key family law themes and

then discusses the important issue of funding of family law proceedings. The course book then goes on to review the law relating to marriage and civil partnerships. The law and procedure for divorce and dissolution of a civil partnership is then explained and the differences with judicial separation are outlined. The rights of cohabitants when relationship ends are also reviewed. Next, the book discusses Private Law Children, focussing on the application of the Children Act 1989 to the resolution of disputes between parents. Public Law Children is explained and the role of the state in child protection cases is described. Finally, the course book reviews the law relating to domestic abuse, including the requirements of the Domestic Abuse Act 2021.

This course book is suitable for paralegals and junior staff working in family practice teams, as well as for junior legal staff working in child protection teams in local authorities.

Jenna has been working with CILEX in varying roles over the last year. The Journey to creating this book started over five years ago. Jenna began teaching Level 3 Family Law and Level 6 Family Practice with The Law Academy, based in Liverpool. *"I really enjoying teaching, I am really passionate about family law and teaching allows me to pass on this passion with the lawyers of the future".*

Jenna then got involved with CILEX directly with the apprenticeship program. Jenna has assisted in the development of what the role of an apprenticeship would involve, what they generally be involved with assisting a family team. In addition, creating example portfolios so that training providers are assisted with the standards expected.

This role lead to involvement with other programs. Jenna was then commissioned to assist with the syllabus drafting and exam writing. This naturally led onto Jenna being commissioned to edit the text book that sat along this program. *"It has been a real honor to write this text book, I was once told everyone has a book inside them, little did I know, mine would be a family law text book".*



"Balancing running a team and writing this book has really been a rewarding challenge. Family Law is really emotive and challenging and its important that the students are aware of the issues that we grapple with on a daily basis and have a real fundamental understanding of how they can assist clients."

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Vauxhall Community Law & Information Centre

The latest news from Vauxhall Law Centre. Providing Access to Justice in the community since 1973.

Hello, Goodbye



Emanuele Sanna and Alan Kelly

We began this year with a sad farewell to one of our most valued members of staff, Alan Kelly, as he begins his well-deserved retirement. Alan played such a major role in the advancement of the Law centre, and has helped grow us from a team of 3, only working the equivalent of one full time member of staff, to our current team of 13.

Anyone who has worked alongside Alan will know that he cares deeply for his work, and his passion for social justice is boundless. We miss him already, but wish him all the best in this new chapter of life.

We're also incredibly happy to welcome two new members of staff to our team. Emanuele Sanna joins us as the newest member of our Welfare Benefits team, after previously volunteering at the law centre. Emanuele has lots of previous experience in the advice sector, having previously worked for Citizens Advice in Peterborough, and he is currently finishing his LPC course.

Shannon Donnelly also joins us as a member of our Housing team, specialising in Migrant and Asylum housing cases, after her previously working with an NGO in Northern Greece, helping to provide legal advice to migrants, asylum seekers and refugees.

We're very fortunate to have these two fantastic new starters, who will no doubt help us to grow further, with their knowledge and expertise.

'So We Marched' – The launch of the Giz a Job Project's Exhibition

Next month also sees the launch of the 'So We Marched!' from the Giz a Job project. This exhibition tells the story of the 1981 People's March for Jobs, and features oral testimonies from those who took part, featuring archival footage and documents from the time. VLC has acted as the accountable body for the heritage project, and is proud to support the exhibition.

The exhibition is completely free, and launches on Monday 4th of March on the

3rd floor of Central Library, until the 31st of May this year.

If you have the chance, make sure you visit this insightful and important exhibition, that documents a true piece of working class history.

A Visit from The Law Gazette

We were recently visited by **Eduardo Reyes** of the Law Society Gazette, who this month published an informative piece on the city's recognised homelessness crisis. Eduardo spoke one on one with many of our team, gaining insights into the different issues facing law centres like us, with a specific focus on the ongoing struggle of managing the severe load of homelessness cases that we deal with.

We're extremely grateful for Eduardo's time with us. His article provides a fantastic view of the ongoing situation we face as a city, and explains clearly some of the failings of the LA in their duties to some of those facing homelessness, as well as accurately portraying the hard work of our housing department. If you'd like to read Eduardo's article, please click <u>here</u>.









Recent Client Feedback

Thanks to the hard work of **Elia** - a law student at the University of Liverpool, and one of our volunteers - we received some fantastic feedback from a client he worked with. The quote reads:

"After leaving a government job after 23 years, I did not receive the level of care that VLC has provided. This alone, speaks volumes about the service available in my community for which I am so grateful."

Elia started with us as a Triage Volunteer, before being trained up and supported by our Staff to complete Personal Independence Payment applications.

He helped this client with their PIP claim back in November, and we have recently found out that they were awarded the enhanced rate for daily living and standard rate for mobility. That's £6,689.80 a year in the back pocket of someone who, despite this government's best efforts, is absolutely entitled to it.

We then received this brilliant feedback from our client regarding Elia's effort, and the service as a whole. Well done Elia!

Can you help Vauxhall Law Centre?

At Vauxhall Community Law & Information Centre volunteers are the backbone of our organisation, their dedication to supporting our work and commitment to promote access to justice during the cost of living crisis has been immense. We get support from our volunteers in many different ways:-

• Our Board are volunteers, providing support and strategic direction for the

organisation.

- Volunteers assist with our advice provision and representation.
- Volunteers help with our Triage work, helping clients to book appointments, and helping to signpost them in the right direction.

If you think you, or your company can support our work at VCLIC, please don't hesitate to contact us. We are looking for volunteers with skills in a wide range of areas such as Financial Management, HR, Technology, Fundraising, and Advice. If you have any skills and would like to get on board with us, please drop us a line at <u>recruitment@vauxhalllawcentre.org.uk</u>

Please consider using volunteering as a means to meeting some of your company's Corporate Social Responsibility commitments and supporting the local community.



Protecting the most vulnerable in Liverpool - a response to Eduardo Reyes' article in the Law Society Gazette



Liverpool is and always has been a welcoming city. We remain committed to ensuring that the most vulnerable are cared for and provided with a safety net, in accordance with statutory obligations. This is particularly the case regarding those at risk of homelessness and people found rough sleeping.

So it was with genuine disappointment to read **Eduardo Reyes**' article in the Law Society Gazette ('Left in the lurch in Liverpool', 9 February) as it included some inaccurate information that brought our commitment into question.

On the specifics, and to reassure the Gazette's readers, Liverpool City Council does operate a face-to-face service for people who are homeless. Equally, the claim that the city's rough sleeping response is conducted via an online or telephone system is untrue.

We have a 24/7 street-based Assertive Outreach team. They work 365 days a year and provide robust and accurate information regarding the individuals rough sleeping and the plans needed to support them to leave the streets. In 2023 the team helped over 100 people per month off the street and into support.

The reference to Labre House as a 'last ditch night shelter' is also a misrepresentation. This was an emergency night centre for rough sleepers, which had to be closed for safety reasons during the Covid-19 pandemic.

Since then, the council has commissioned additional 'First Step from the Street' accommodation solutions across three sites, in buildings that are staffed 24/7 and that offer a wide range of additional help and support. We have also blockbooked B&Bs and provide access to other temporary accommodation providing a wide range of multi-disciplinary services for people with multiple needs.

In regard to Vauxhall Law Centre, the council has always sought to work in partnership with the VLC and is currently doing so to resolve both individual cases and to discuss policy and process issues.

Further to this, the council works very closely with partners such as Crisis, Shelter, YMCA and the Whitechapel Centre where collaborative working has meant that despite enormous pressures we continue to tackle homelessness in the city in a proactive manner.

Indeed, over the last year, we have increased capacity in the Homelessness Service by an additional 18 staff, speeding up decisionmaking and further improving our service delivery to homeless applicants. Protecting our must vulnerable remains a cornerstone of the council.

There is work to do, but the focus is very much centred on supporting those people.

Cllrs Liam Robinson & Sarah Doyle Council leader/cabinet member for housing Liverpool City Council

Republished from the Law Society Gazette 23/02/24 edition.



Liverpool LawSociety

"Great personal branding will differentiate you from competitors & allow you to build trust with prospective clients"

- Carolin Castrillon, Forbes

Liverpool Law Society is delighted to be working with Personal Branding Coach Jannette Brimm, to offer a range of focussed, Personal Branding sessions.

Commencing March and in support of International Women's Day and this year's theme of 'Inspire Inclusion' Jannette will share her knowledge, tips & techniques to help female lawyers develop their brand to inspire inclusion in the career. For more info: <u>Personal Branding for Women Lawyers (online) | Liverpool</u> <u>Law Society</u>

In May, focus will be on newly qualified lawyers. To kick-start their careers, Jannette will share the vast benefits of developing your personal brand in support of your business development objectives, career performance to the company and most importantly getting your name out there. To snap up your place, see: <u>Personal Branding for NQ's</u> | Liverpool Law Society

Personal Branding is not only relevant for individuals but is also a powerful tool for developing and growing a business. During June, Jannette will focus on Associates & Partners, sharing know-hows as to why having, building and incorporating your personal brand into your business development is a powerful business development strategy. Find info here: <u>Personal</u> <u>Branding for Associates/ (online) | Liverpool Law Society</u>

Finally, as we continue to support Black lawyers during Black History Month, Jannette, will once again be sharing her tips and techniques to help Black lawyers develop their Personal Brand to increase their business development opportunities, raise their professional profile and support their continual career growth. See: <u>Personal Branding for</u> <u>Black Lawyers (online) | Liverpool Law Society</u>

All sessions are online & cost £55 members / £70 non-members.

Jo Downey Director of Education & Training





Liverpool Law Society is delighted to announce our 2024

Annual Dinner and Legal Awards

will take place on Thursday, 14 November at the Rum Warehouse, Liverpool

GUEST SPEAKER:

THE RT HON THE BARONESS HALE OF RICHMOND DBE

The Liverpool Region's legal community are invited to come together to celebrate being part of a proud and vibrant legal profession.

Members and non-members can attend the Dinner.

Nominations for the 2024 Legal Awards will open in early July and close early September

<u>Dinner bookings now being taken - click here</u>







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Open to members of Liverpool Law Society

CATEGORIES

- RISING STAR AWARD
- OUTSTANDING TEAM AWARD NON-CONTENTIOUS
- OUTSTANDING TEAM AWARD DISPUTE RESOLUTION & LITIGATION
- OUTSTANDING TEAM AWARD FAMILY LAW
- EQUALITY, DIVERSITY & INCLUSION AWARD
- OUTSTANDING LAWYER AWARD
- LAW FIRM AWARD (1-49 EMPLOYEES)
- LAW FIRM AWARD (50+ EMPLOYEES)

With eight categories to choose from, we are confident there is something for everyone. Nominations will open in early July and close in early September.

The winners of the 2024 Legal Awards will be revealed at a glittering black-tie ceremony during the Annual Dinner on Thursday, 14th November 2024.

For further information and to book tickets for the Annual Dinner and Legal Awards, <u>click here</u>.



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Merseyside Lieutenancy Stakeholder Engagement Event



On 27 February 2024 I visited Liverpool Town Hall for the Merseyside Lieutenancy Stakeholder Engagement Event. The Town Hall, built in 1749, is a magnificent building, displaying the very best of Georgian architecture. The interior has a breath-taking Minton tile floor showing the arms of Liverpool, and the walls are decorated with murals created in 1909. The Staircase Hall has been described as one of the great architectural spaces of Liverpool, and I must agree, it feels like you are stepping back in time when you walk up the stairs.

After refreshments and a bit of networking, we were led into a large

ballroom for His Majesty's Lord Lieutenant, **Mark Blundell**, to welcome guests and talk about the work that the Lord Lieutenancy do. **Mr Blundell** was joined by **Mr Robert Owen**, JP, Vice Lord Lieutenant, Deputy Lord Lieutenant **Lesley Martin Wright** and **John Flamson, OBE**, Deputy Lord Lieutenant.

There are over 40 active Deputy Lord Lieutenants who co-ordinate royal visits, however this is not all that they do. They also support people, groups, communities, businesses, and organisations that live, work, and volunteer in the Liverpool City region, and those that wish to celebrate Merseyside's rich culture, heritage, and diversity.

The Merseyside Lieutenancy was also involved in a tree planting initiative, the Queens' Green Canopy, introduced for the Queens' Platinum Jubilee 2022, that left a living legacy of over three million trees planted in her late Queen Majesty's name.

There are outreach projects to primary schools to discuss the role of the monarchy and the Duchy of Lancaster Benevolent fund supports causes in the community to try and improve lives.

The honours granted to individuals are Knight/Dame, CBE,OBE,MBE and





Lesley Martin Wright DL

BEM. There are awards for individual volunteers (King's Award for Voluntary Services) and businesses (King's Award for Enterprise).

The attendees were also asked to consider if they, or anyone they know, would be interested in becoming a Magistrate, and to get in touch if they do.

The event concluded with a question-andanswer session, with questions focusing on the application process and timescales for honours and awards. If anyone knows of someone who they believe deserve an honour or award for making a difference due to their bravery, merit or services to charity or their community please visit <u>https://www.merseysidelieutenancy.org.uk/</u> <u>honours/</u>







Mr Robert Owen, Vice Lord Lieutenant



Roger Phillips DL



Lord Lieutenant Mark Blundell



Not all probate genealogists are created equal

Probate Research is a largely unregulated industry with no barrier to entry. You could, if you wanted, set up your own firm tomorrow quicker than you can say "Who Do You Think You Are?". No qualifications are required, nor any evidence of relevant training undertaken needed. Which is quite worrying when you think about it.

Contrast this with the life of a legal professional working in a law firm in England. A heavily regulated industry overseen by the Solicitors Regulation Authority. Years and years of high intensity study, followed by further years of gaining hands-on experience. All with a requirement to demonstrate ongoing competence and continuous personal development.

When viewed like this, these two worlds could not be more different, yet they can intersect regularly in the Private client law sector. The danger here is when seeking assistance from a probate genealogist, a legal professional could unknowingly instruct an unqualified novice. If there are any issues, guess who the client is going to blame?

At Anglia Research, we quickly identified the need for some form of regulation for the probate genealogy industry and have been regularly campaigning to help raise standards across the sector which has continued to grow. We are a founding member of the Association of Probate Researchers (APR), the first body to introduce independent regulation to a previously unregulated industry. Both corporate members and individual members abide by the APR's Professional Standards and Ethics Code.

Those using the services of APR members, whether legal professional or member of the public, are safe in the knowledge that all members subscribe to our Professional Standards and Ethics Code. Through our case managers' membership of the Professional Paralegal Register (PPR), there is an independent complaints procedure and compensatory scheme, currently the only professional body for probate researchers that do so.

We believe that this is essential for those that are serious about offering their clients reassurance and protection. For our clients, this means that in addition to the guarantees offered by our own code of conduct, they will have the reassurance of connecting with a culture in which accountability is fundamental. The PPR acts as both a register and a regulator for professional paralegals and, following an acquisition earlier this year by CILEX, all PPR members automatically became CILEX members.

Anglia Research employs more accredited genealogists, legally

qualified and independently regulated staff than any other UK probate research firm. Our accreditation is your guarantee. We have a commitment to our profession we employ sixteen staff who hold paralegal PPR certificates and in addition have five members of staff who are Association of Genealogists and Researchers in Archives (AGRA) accredited.

In addition to this accreditation and qualifications, our Case Managers have a combined total of over 250 years of experience. We know that your best guarantee of a legally sound outcome lies in the calibre of our team. Our investment in accredited staff is your assurance. We believe it is our staff that sets us apart.

Ultimately, we are so focused on case manager training and accreditation because we know how important it is to give comfort to legal professionals using our services. Not every probate genealogy firm has taken this view and thus, not all probate genealogy firms are created equally.

So, overall, it pays to use the services of an experienced, accredited firm that has experienced, qualified employees to undertake the work needed in a professional manner. Do your due diligence. You owe it not just to yourself but also to your clients.

www.angliaresearch.co.uk

Anglia Research Global Experts in Probate Genealogy Est. 1979

Assisting North West Law Firms for over 40 years











www.angliaresearch.co.uk legal@angliaresearch.co.uk 01704 333 350



in , Anglia Research Services Limited





Missing Beneficiaries







Tee Off for Success!



Liverpool Law Society Hosts Corporate Golf Day for Networking and Charity

We are delighted to announce KE Costs Lawyers have joined us as our headline sponsor for our inaugural Golf Day, scheduled for 6th June 2024 at the prestigious Caldy Golf Club.

KE Costs Lawyers are experts in costs litigation with offices in London and Liverpool. They are an expert multidisciplinary costs management company, providing a bespoke Legal Costs Service. Their teams specialise in a wide-range of commercial disputes and professional negligence litigation; product liability and property litigation claims. They also offer expert costs advice in the fields of Clinical Negligence; Catastrophic Personal Injury; Industrial Disease and Court of Protection matters.

This exclusive event promises a day of networking, friendly competition and philanthropy, bringing together professionals from across the industry for a memorable day on the green.

The Golf Day serves as an opportunity for business leaders, clients and industry peers to come together in a relaxed and picturesque setting, fostering meaningful connections while enjoying a round of golf. Participants will have the chance to showcase their skills on the course, engage in friendly rivalry and forge new relationships in a convivial atmosphere. **Gaynor Williams**, president says "We are thrilled to host our first Golf Day, bringing together professionals from the Liverpool City Region for a day of camaraderie and collaboration. Golf provides the perfect backdrop for networking, and we look forward to strengthening existing connections and building new partnerships while supporting a worthy cause."

Event Highlights:

- Tournament: The day will feature an exciting golf tournament at Caldy Golf Club, known for its beautiful coastal views and picturesque setting. The course provides the perfect challenge for golfers of all abilities.
- Prizes: Prizes will be awarded for various categories, including Longest Drive, Closest to the Pin, Team Winner and the overall Tournament Winner.
- Networking: It's not just about golf! This event will provide a wonderful opportunity to network and socialise with fellow members. Forge new friendships, catch up with old ones, and enjoy the company of like-minded individuals.
- Dinner & Awards Ceremony: After the tournament, we will gather for a delicious dinner and an awards ceremony to recognise the tournament winners and share memorable moments from the day.

Furthermore, the Corporate Golf Day will also serve as a platform for charitable giving, with proceeds from the event benefiting Byrne Avenue Baths. Byrne Avenue Trust are dedicated to providing a much needed community space in Rock Ferry on Wirral. They work tirelessly to provide a range of sporting opportunities, community activities and social events for the local community, whilst preserving and promoting the history and heritage of a once derelict building.

Sponsorship opportunities are available for businesses looking to enhance their visibility and support a worthy cause. Interested parties can contact Jaidan Events at <u>sharon@jaidan.co.uk</u> for more information on sponsorship packages.

Entry Fee

£600 +vat per Team of 4. The entry fee includes light refreshments on arrival, green fees and evening dinner. To enter your team please register on our website: <u>https://www.liverpoollawsociety.org.uk/</u> <u>events/2024-golf-tournament/</u>

Don't miss this opportunity to tee off for success and make a difference in the community. Secure your spot today and join us for a memorable day of golf and networking.











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Regulation Update March 2024

The latest Regulation news from Andrea Cohen of Weightmans LLP



Andrea Cohen

Once again, we provide our usual overview of what has been happening in the last month in the world of risk and compliance, including recent regulatory and disciplinary decisions.

SRA guidance on sanctions compliance

Following the April 2023 sanctions questionnaire, the SRA has written to more than 1,000 firms who do not act in matters within scope of the Money Laundering Regulations (MLR), who had responded to the survey to say they did not have or were not aware of a written firm-wide risk assessment (FWRA), or the process for identifying an ultimate beneficial owner. The SRA said that, based on the responses, it identified a large number of firms that had indicated they had poor controls in place.

The letters include guidance on complying with the sanctions regime, completing firm-wide sanctions risk assessments, and on client identification and screening. The firms written to were also provided with a template for the risk assessments, based on the R18 MLR template it has produced for firms acting in matters within scope of the MLR.

The SRA warns that it will be testing compliance via on-site inspections and a programme of desk-based reviews to test a sample of these firms' controls later this year.

Questions have been raised whether such steps are appropriate for firms outside scope of MLR. While the sanctions regime is applicable to all types of work and breach of it is strict liability, and it is correct that the SRA advises/warns firms of the obligation to comply, for those firms not acting within scope of MLR, CDD procedures (over and above the need to identify who they are acting for) are not required and there is no requirement for a FWRA. Firms should consider their level of risk in relation to sanctions breaches and may determine that e.g. sanctions screening may be appropriate or additional CDD measures, and consider the correct approach based on the type of work and clients. A record of those considerations and decisions should be kept and reviewed, rather than completing the lengthy, and, depending on the type of work, client etc. largely irrelevant SRA template.

The Compli team is also on hand to aid you in this respect, so please do get in touch if we can help you.

Changes to the UK sanctions list

Staying with the topic of sanctions, more changes have been made to the UK sanctions list, including, as at the date of writing: 8 new designations under the Iran sanctions regime; 6 new designations under the Counter-Terrorism (International) sanctions regime; 4 new designations under the Yemen sanctions regime; 4 new designations under the Myanmar sanctions regime; 4 new designations under the Global Human Rights sanctions regime; 1 new designation under the Cyber sanctions regime, three variations to the Russian sanctions regime and one to the Libya sanctions regime. As always, the advice is to keep a careful eye on the list, run regular checks, and if you don't already do so, sign up for HM Treasury updates.

Changes to the high-risk third countries (HRTCs) list

The list of HRTCs is no longer located in Schedule 3ZA of the MLRs 2017, which has been deleted. Firms now need to check for themselves whether a jurisdiction is a HRTC on the Financial Action Task Force (FATF) website.

Regulation 33(3)(a) now defines HRTCs as 'a country named on either of the following lists published by (FATF) as they have effect from time to time:

- High-risk jurisdictions subject to a call for action;
- jurisdictions under increased monitoring.

The list is subject to change up to three times per year, following FATF's Plenary sessions each February, June and October. Firms should diarise these dates as they appear on the FATF events page (<u>https:// www.fatf-gafi.org/en/calendars/events.</u> <u>html</u>) and check whether the HRTC list has changed following each FATF plenary.

Economic Crime and Corporate Transparency Act 2023 (ECCTA) - update As we have reported previously, having received Royal Assent on 26 October



2023, the wide ranging changes are being introduced over time, some requiring secondary legislation, additional funding, further guidance by the Secretary of State etc.

The changes in relation to entity liability for fraud, where a senior manager commits a 'relevant offence' (more limited than economic crime, but includes fraud, theft, cheating the public revenue etc). acting within scope of authority, came into force on 26 December 2023. This could lead to some concerns that a rogue partner or director in a firm could create criminal liability for the practice which may result in a loss of authorisation.

Companies House, in a blog on <u>gov.uk</u>. confirmed that it was aiming to introduce the first set of changes on (but no earlier than) 4 March 2024, including:

- greater powers to query information and request supporting evidence
- stronger checks on company names
- new rules for registered office
- addresses • a requirement for all companies to
- a requirement for all companies to supply a registered email address
 a requirement for all companies
- a requirement for an companies to confirm they're forming the company for a lawful purpose when they incorporate, and to confirm its intended future activities will be lawful on their confirmation statement
- the ability to annotate the register when information appears confusing or misleading
- taking steps to clean up the register, using data matching to identify and remove inaccurate information
- sharing data with other government departments and law enforcement agencies

Post Office Horizon IT scandal: SRA investigation update

In light of the recent significant interest in the Post Office Horizon Scandal and the resumption of hearings at the ongoing statutory public inquiry, the SRA has published an update on its investigation (https://www.sra.org.uk/sra/news/press/ post-office-update-2024/), following on from its October 2022 statement. The SRA confirms that it has a number of live cases regarding solicitors and law firms who worked on behalf of the Post Office/Royal Mail Group and it is currently gathering information and evidence. The investigation covers 'multiple, multifaceted issues where there may have been potential misconduct'. SRA Chief Executive Paul Philip makes clear that the SRA will take action where solicitors have been found to have behaved unethically, and that those solicitors should 'expect serious consequences'.

Launch of review of consumer protection in light of sector risks

The SRA has launched its 'Protecting the public: our consumer protection review' with a deadline for submissions of 1 July 2024.

The review focuses on two main areas:

- Its policy and operational arrangements for identifying and managing or mitigating risks, including how to reduce the risk that something goes wrong at a regulated law firm that causes harm to clients in light of the increasing number of SRA interventions. To do this, the SRA will look at how it identifies risks in the sector, monitors and approves firms, and the rules and controls around holding client money;
- Compensation fund arrangements in light of the risks identified. In this regard, the SRA will review how to strike a balance between appropriate protections for clients, while making sure its approach does not increase the cost of legal services by too much, e.g. using a cap, or considering if there is a case for reducing the maximum pay out.

Over the next few months the SRA will be meeting with a range of solicitors and representative groups, as well as with consumers and representatives, and looking at the approach of other regulators and sectors.

SRA considers CILEX regulation

While CILEX's consultation found its members were generally positive about

the proposal to move its regulation to the SRA, Anna Bradley, Chair of the SRA Board, commented that some responses to the SRA's consultation raised concerns about dilution of the solicitor brand and consumer confusion.

The Board nevertheless agreed that it remains interested in regulating CILEX members, but further work needs to be done before final decisions can be taken, including e.g. the need to develop and consult on arrangements to regulate CILEX paralegals and students, and the need to consider how best to deliver the consumer benefits of regulatory simplification and avoid potential consumer confusion.

New practice notes and guidance

The SRA and The Law Society have each published one new piece of guidance since our last update.

- SRA: Sanctions regime firm-wide risk assessments: guidance
- The Law Society: Building Safety Act 2022: a guide for conveyancers

Disciplinary and regulatory decisions:

There has once again been a large number of decisions reported since our last update. Notable decisions include:

Fine for telling client to pay solicitor personally

A decision by the SRA to enter into a regulatory settlement, resulting in a fine rather than referral to the SDT, with a solicitor who told a client to pay fees to his personal account has led to discussion on LinkedIn with questions being raised about the consistency of SRA decisions.

The solicitor received over £14000 over two years, and told the client he would only continue to act if payment of a further £12000 was made before the final hearing. There was no engagement letter and no bills from the firm. The client complained to the firm which repaid the fees plus compensation. The final hearing had to be adjourned so that she could find alternative representation.



Regulation Update Continued

The SRA fined the solicitor £10,402, stating in the reasons why a fine was appropriate that: the admitted misconduct was serious; demonstrated a disregard for regulatory obligations and lack of integrity and caused harm to the client, but took into account that 'this was an isolated incident' and he admitted he 'made an error'. It concluded that a fine was appropriate as 'the admitted conduct was serious but not so serious that sanction by the Tribunal is necessary or proportionate in order to maintain professional standards and to uphold confidence in the solicitors profession.' As a result of the Agreement, the decision to refer to the SDT was overturned.

Fines for AML failures

A firm has been fined £23,216 for various AML failures, including failure to have in place a firm-wide risk assessment (FWRA), policies, controls, and procedures (PCPs), and client and matter risk assessments. The firm agreed to pay costs of £1,350.

Three firms have been fined between £3,000 and £11,000 each for failure to have in place a FWRA and adequate PCPs. One firm was fined £9,750 for the same, along with further failings in relation to adequate client and matter risk assessments on 19 client files.

A solicitor who was his firm's MLRO and COLP was fined £14,099.76 and ordered to pay costs of £1,350 after it was found that his firm did not have in place a FWRA and the risk assessments had not been updated since 2003.

£1,500 fine for failure to notify of material change

A firm has been fined £1,500 and ordered to pay costs of £150 after failing to promptly notify the SRA of a material change to the information it had previously provided to the SRA about its COFA. The amount of the fine was increased after the firm continued to breach this requirement following the issuing of the standard £750 fine.

Fines for breaches of accounts rules

A solicitor, who was also his firm's COLP, COFA and MLRO, has been fined £9,000 and ordered to pay costs of £1,350 for accounts failures including permitting cash shortages to arise and allowing improper transfers from the client account to the office account.

A firm has been fined £986 and ordered to pay costs of £600 for allowing and/or failing to prevent its client account being used to provide a banking facility.

A second firm has been fined £5,899 for holding residual client balances totalling just over £500,000 and dating from as far back as 1995.

Two firms fined for breaches of the Transparency Rules

Two more firms have been fined £750 and directed to pay costs of £150 for failure to publish the information required by the SRA Transparency Rules.

Further fines issued for drunk driving

Two solicitors have each been fined just over $\pounds 4,000$ for driving over the limit and causing damage to property.

A third solicitor has been fined £13,836 for driving when over the limit. This follows the recent trend of large fines being issued by the SRA for drunk driving, which has been heavily criticised by commentators.

Rebuke for Facebook posts

A solicitor has been rebuked and ordered to pay costs of £600 in relation to four posts published on his Facebook account between 2016 and 2018 which were deemed offensive, inappropriate and/or discriminatory.

Solicitor suspended for jury internet research

A solicitor who was previously given a custodial sentence for conducting an

internet search while serving on a jury has been suspended from practice for eight years. The SDT acknowledged that there was extensive mitigation but felt that it would not be appropriate to allow her to return to practice before her 10-year disqualification from jury service came to an end. She was ordered to pay costs of £5,000.

Solicitor struck off for making false representations about the progress of a case

A solicitor has been struck off the roll for failing to progress his client's claim and dishonestly making false representations as to the progress of the case to the client, his opponent in litigation and to the client's son (who took over conduct of the case). He was ordered to pay costs of just under £10,000.

Solicitor struck off for misleading firm about loans and referral agreements

A solicitor has been struck off for various wrongdoings, including: stating he did not have any personal or financial relationships with any clients of the firm, when in fact he received four loans from clients totalling £630,000; giving an undertaking to a third party to pay funds to them without the consent of the client, and falsely declaring that he had not entered into any referral or introducer arrangements without prior COLP approval. He was ordered to pay costs of just under £30,000.

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How Compli can help...

The Compli Solicitor Regulatory and Professional Discipline Team can provide expertise and advice on risk and compliance, AML, disciplinary assistance etc. If we can help in any way, please get in touch at compli@weightmans.com.

Andrea Cohen

Compli, Weightmans LLP



Current and Future Legal Leaders: Managing your law firm business or legal team

They say "Work Smarter, Not Harder" - but what does that really mean? Well, January's Current and Future Legal Leaders: Managing your law firm business or legal team conference, held at the offices of Taylor Wessing at the Edward Pavillion, Albert Dock, provided us with some useful insights.

Hosted and coordinated by **Jo Downey** and chaired by **Lauren Cannon** from In House Legal Solutions, the conference consisted of eight thoughtful and inspiring sessions, each of which deserves its own separate write up!

Here's just a brief summary of some key takeaways from each of the sessions:

Session 1: The Business of Law -Joanna Kingston-Davis, MAPD Group

A refreshing perspective on how legal practices should be led, and by whom. Great lawyers do not necessarily make great leaders, great leaders are not necessarily lawyers. Get the right people on the bus and build the right leadership team.

Session 2: Incorporating climate change opportunities into your business strategy - Sally Redman, Landmark Information Group

This session served as a useful prompt for law firms to address climate change risk for reasons well beyond simply being seen to be *"doing the right thing"*. A robust climate change strategy reduces business risk and creates new business opportunities, ultimately benefitting your business (and your bottom line!).

Session 3: Developing a Leadership Presence in the Legal Sector - Kelsey Greenaway, Dale Carnegie

What exactly is leadership presence? Studies have shown that c85% of the

traits of strong leaders are about their attitude and skills (such as passion, integrity, positivity, empathy and consistency) rather than specific knowledge. Understanding this enables us to work towards becoming more influential leaders. Emotional change leads to behavioural change, behavioural change leads to performance change.

Session 4: Embracing Neurodiversity in the Workforce - Lee-Ann Crossman, Hill Dickinson

1 in 7 people are neurodivergent, a term that covers a whole range of learning differences including dyslexia, autism and ADHD. By understanding your team's strengths and challenges, you can create the right working environment and unleash the potential of your neurodivergent workforce.

Session 5: Managing Workplace Mental Health - Elizabeth Rimmer, LawCare

Prevention is far better than cure when it comes to mental health and wellbeing in the workplace. Measures to mitigate burn out and other commonplace psychological issues suffered by those pursuing a legal career must be led and supported from the very top of the organisation.

Whether you are supporting a member of your team, or you yourself are in need of support, LawCare - <u>https://</u> <u>www.lawcare.org.uk/</u> - is here to help.

Session 6: Pros and Cons of Agile Working - a panel discussion (Alison Lobb - Morecrofts, Gaynor Williams - Bennett Williams Solicitors, Alum Ullah - Bond Taylor) chaired by Lauren Cannon

With remote / hybrid working increasingly becoming the norm, it's important to understand that there is no 'one size fits all' model. The key to understanding what the correct working model is for your organisation starts with the question *"what are the operational needs of the business?"*.

Session 7: Leadership Qualities, Lessons from Sport - Gemma Ellison, Heart Leadership

Sport provides us with some great examples of strong, inspirational leaders. This session focussed on key learnings from **Jurgen Klopp, Simone Biles** and **Sir Dave Brailsford**. Three key takeaways from this session; to make big changes start by making small changes, create a culture of experimentation within your organisation, and be patient.

Session 8: Our Iceberg is Melting - An Introduction to Value-Based Pricing - Shaun Jardine (and Declan!), Big Yellow Penguin

Value-based pricing is about understanding what value means to your clients. Ultimately, clients care far more about the work being delivered than the number of hours it took to do it, so pricing should reflect the quality of the output rather than the volume of the input. Above all, pricing should be transparent, consistent and fair.

So all in all, a day full of learnings, inspiration, and fun! Thank you once again to **Jo Downey, Lauren Cannon** and **Taylor Wessing**, and a special thanks to sponsors Landmark Information Group.

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The importance of a DNA test for Immigration applications



An investigation by the BBC in May last year1 revealed that there are UK men who are posing as fathers for migrant women and taking fees of up to £10,000 for falsely adding their names to birth certificates.

This enables the child to become a UK citizen and hence for the mother to gain residency. It appears that despite the rules banning the practice, these *"fathers*" are advertising on social media and are using elaborate and convincing backstories, which can only get more convoluted with use of AI. Social media posts involve both men advertising themselves as *"fake fathers"* and women searching for a British *"citizenship daddy"*.

Falsification of a birth certificate is a criminal offence² yet the practice continues, with rare examples of prosecutions.³ As evidence of paternity, sufficient checks are required and the technology to do this, via a DNA test, is both readily available and tried and tested.⁴

Since the Home Office has not published data on the number of visas given to non UK parents of British children, the scale of this fraud is not publicly known. However, it is the case that if an illegal migrant female gives birth in the UK to a child who has either a) been fathered by a man with indefinite leave to remain or b) is a British citizen, then the child will be British by birth. This does the correct thing of course, it protects the child, but the consequence is that the mother can apply for a family visa and hence citizenship.

The BBC reported that this practice has been going on for many years, including communities from Bangladesh, India, Nigeria, Pakistan, Sri Lanka and Vietnam. In these cases, where the *"red flag"* is raised, there is a clear requirement for a DNA paternity test. For example, a red flag would be a British child with one British parent who is named on the birth certificate and a non-British mother who is without a visa. Unfortunately, there is no legal requirement in the UK for a DNA test when an application is made for a child's passport or when registering the birth. There is a strong case for change.

In the cases of unmarried parents, the responsibility for registering the birth of a child lies with the mother and only the mother has parental responsibility. If both "parents" are present at the registration, then there is the situation where the fake father or the citizenship daddy will have parental responsibility for the child. Falsification aside, once the visa/citizenship process is complete, the mother may claim "genuine mistake" and via a DNA test, apply to have the fake father or citizenship daddy removed from the birth certificate. Equally, should the biological father appear, he may also apply for an amendment, but this would not give him parental responsibility unless a court order was in place or unless the mother agreed.

A DNA test for paternity either excludes a man from biological parentage with 100% certainty or determines that he is the biological father. The latter, an *"inclusion"* is usually given as a probability of paternity and will give a statistic in excess of 99.99%, especially if we have been able to test the mother. Of course, paternity DNA tests of this nature should be conducted by an accredited company, such as our own, which is on the Ministry of Justice list as *"a body that may carry out parentage tests directed by the civil courts of England and Wales under section 20 of the Family Law Reform Act 1969"*.⁵

By using such a company for these tests, you can be assured that as far as is possible, checks are carried out to establish identity and facts, plus we control the sample collection, via use of one of our registered samplers and adherence to the legal procedure for collecting samples for DNA testing.⁶ This is important because there is a chain of custody which allows reliance on the DNA testing data.

The BBC investigation into birth certificate manipulation has provided illumination into circumstances which are disconcerting and indeed, helps makes the case for more accredited DNA testing to be used in immigration applications.

About the author:

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Complement Genomics Ltd (trading as Dadcheck*) is accredited by the Ministry of Justice as a body that may carry out parentage tests directed by the civil courts in England and Wales under section 20 of the Family Law Reform Act 1969.

Please see: https://dadcheckgold.com

Tel: 0191 543 6334 e-mail: <u>sales@dadcheckgold.com</u>

Citations

¹ UK men offered £10K to pose as dads in visa scam, BBC investigation finds - BBC News

https://www.bbc.co.uk/news/uk-65556437

 ² Section 4 of the Perjury Act 1911
 ³ Mum jailed for lying about the dad of her baby on birth certificate to spite exboyfriend - Wales Online

https://www.walesonline.co.uk/news/walesnews/mum-jailed-lying-dad-baby-16932386 ⁴ www.https://dadcheckgold.com

⁵ dadcheck^{*} is UKAS accredited testing laboratory No. 2743.

⁶ Blood Tests (Evidence of Paternity) Regulations 1971 (SI 1971/1861), as amended Blood Tests (Evidence of Paternity) (Amendment) Regulations 2015.

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Charity Spotlight: Everton in the Community



On 19 February 2024, Everton in the Community, the official charity of Everton Football Club, marked 36 years of changing, and saving, lives across Merseyside.



The charity celebrated its birthday in the build-up to kick-off ahead of **Sean Dyche's** Blues taking on Crystal Palace under the floodlights on a chilly Monday night at Goodison Park and the football community came together to 'Be Sound and Bring a Pound' in celebration of EitC's dedicated work in tackling social issues prevalent within L4 and the wider community.

The campaign was launched to raise vital funds to aid Everton in the Community's

work in supporting those most inneed across Liverpool City Region whilst also celebrating the unrivalled generosity and unique spirit of the Everton fanbase who tirelessly support the charity season after season.

Established in 1988, Everton in the Community has been providing a lifeline to those most in need across the region for more than three decades, and recently launched Trinity Project'; its ambitious fiveyear strategy to create brighter futures and stronger communities through its innovative and impactful delivery.

As part of its mission, the next five years will see EitC embark on a bold and transformative mission, putting a stake in the ground and waging a relentless battle against poverty, inequality and health disparities. Paving the way for a brighter future by empowering thousands of residents to achieve meaningful work, better health, enriched lives and lifelong learning.

The Goodison Campus

Based out of Liverpool 4, a stone's throw from Goodison Park, the Community Campus is a £13million capital build project comprising of The People's Hub opened back in 2017 by HRH Prince Edward, Everton Free School and Football College, The Blue Base and the most recent addition, The People's Place - a dedicated mental health facility. The first of its kind aligned to a Premier League Foundation, this facility houses GP's, health sessions, sports facilities and trained practitioners supporting those suffering poor mental health. Referrals aren't required, everyone regardless of age, background or demographic are welcome and will be supported by a dedicated team of professionals.

Bridging the Skills Gap

Always at the forefront of innovation and pioneering in approach, Everton in the Community transformed its People's Hub to boast a state-of-the art Digital Skills Lab aimed at tackling the widening skills gap for young people.





This impressive facility would ensure no child in Merseyside is left behind as it aims to combat an ever-increasing skills gap between disadvantaged young people and jobs within digital/STEAM industries. It comes as official stats show digital careers in STEAM are set to double over the next 10 years.

The launch followed research undertaken by STEM Learning, which shows 89% of STEM businesses have found it difficult to recruit staff with the required skills, leading to a shortfall of over 173,000 workers – this equates to an average of 10 unfilled roles per business.

The lab focuses on a hands-on approach to involve participants in their own learning process while developing 21st Century skills to help to prepare them for the future.

Funded by a group of philanthropists and friends of Everton – aptly named 'The First Steam Squad', a year on from its launch the Lab is evolving, and its programmes are having a life changing effect for the participants of all ages who are using it.

The Impact of Client Residual Fund Donations

Learning of the benefits that this facility was bringing to the local community, leading legal firm Weightmans took the decision to donate their annual residual client funds to the charity. In the first year, equipment was purchased and last year kindly donated funds to support EitC's employability programmes. Their impact has been significant; for every £1 donated, more than £29 in social value for Everton in the Community is generated. Social value is the calculation of benefits created by an organisation as part of their everyday output and takes into account the value for money created by the charity but also the wider benefit to society through the direct impact on people's lives, the economy and the environment.

The donation of these kind of funds have had significant effect on the charity's work in supporting the long term unemployed into work, providing digital training to upskill, supporting job searches and improving motivation and resilience – key attributes needed for the job market.

Ways to Support

Everton in the Community is reliant on funds to support more people across its 60+ programmes and donating the money from a residual client fund is one of many ways to support the charity.

Everton in the Community welcome companies to come on board as Charty of the Year partner, strategic partnerships or take part in one of its many challenges and fundraising events or even leave a gift in will.

1878 Community Club is an exclusive network of supporters who are passionate about preserving the life-changing work of Everton in the Community and are invested in building the charitable arm.

For an annual Direct Debit donation of £1,878 you can become a member of the 1878 Community Club and play your part in making a significant difference to the charity's work which impacts thousands of people across Merseyside.

Funds gifted through the 1878 Community Club will be channelled towards supporting Everton in the Community's core programme costs, helping to protect the sustainability of EitC by projecting a stable and dependable income whilst also contributing towards the development of the Goodison Park Legacy Project. For further information on Everton in the Community and how to get involved, please email <u>CSR@Evertonfc.com</u>





Liverpool Law Society celebrates 2023 Legal Award winners and sponsors



On 21 February 2024, Liverpool Law Society [LLS] were delighted to celebrate an evening at Fazenda, with the winners, highly commended, and sponsors of the 2023 Annual Dinner and Legal Awards [ADLA].

Fazenda is a restaurant which inspired by its dual heritage of Argentinian and Brazilian cuisine, located at Exchange Flags, in the city centre.



The evening kicked off at 6:00pm; attendees were provided with a few complimentary drinks and tasty hor d'oeuvres. The President of the society, Gaynor Williams, gave a toast,

welcomed everyone to the event, and thanked the sponsors.



It was great to see attendees networking and discussing a variety of topics, not all law-related, discussions ranged from fitness, the golf day that LLS has planned, as well as everyone's favourite topic "food and drink/dining out".

Liverpool Law Society was proud to hold this event in recognition of great work and excellence in the legal community.

The President made the following statement:



"I was delighted to attend the evening at Fazenda, in recognition of the winners of the 2023 ADLA awards, which took place at the Law Society Dinner, last year.

The society honoured the winners in an exquisite setting. The staff at Fazenda were fantastic hosts, providing hors d'oeuvres and an array of delicious food, and drinks.

I would like to thank the sponsors of the ADLA awards and extend my gratitude to those who attended last night.

Recognition of excellence in the legal community is something that we are proud of in our society, and we welcome the opportunity to celebrate this, at events like this.

Events like this often act as "springboards" to future events. Having engaged with attendees, we are already planning informal get togethers, and dinner appointments as a result.

Engagement is a high priority for us at the society, and something the Joint Honorary Secretaries and Vice President are keen to advocate. By speaking to our members, we listen to what is important to them and how the society can respond accordingly.

Along with the other officers and staff at Liverpool Law Society who attended, we all thoroughly enjoyed the evening and cannot wait for the next event.



I look forward to the Law Society Annual Dinner and Awards which will take place on 14 November 2024 at The Rum Warehouse, Titanic Hotel, Liverpool. It will be another exciting event and if you have not already, keep your diary free for that date!"

Thank you to all the attendees.

We would like to thank the following sponsors for their continued support: Document Direct, Dye & Durham, Fazenda, Index PI, Landmark Information, Liverpool John Moores University, Miller Insurance and the University of Law.

Alum Ullah LLS Director and Joint Hon. Secretary











Forensic accountants in matrimonial cases



Chris Makin

Have you ever come across a forensic accountant who regularly turns business away? Read on!

I receive many requests for help in family cases, often several times a week, typically from the wife who considers that her husband is not making full and correct disclosure of his financial affairs. What am I able to do to help them? This is

a personal note setting out my understanding of the position, and I provide it here so as to avoid the need to give the same explanation repeatedly.

Typically, a lady does a Google search where my name comes well up on page one. She looks at my website, views the videos, reads the war stories, and concludes that I am a helpful character with a wealth of experience (I am, I am!) who can help them to find the husband's hidden assets or the lies in his disclosure.

In the old days, that was certainly the case, and I have had some stunning successes. But these days it's different. Except in the multi-million pound cases seen in the national press, or where a party is so blatantly dishonest that the court recognises the need for an investigation - and this is very rare - the court will only approve the appointment of a forensic accountant to act as a Single Joint Expert (SJE), who acts for both spouses, but with an overriding duty to the court.

This works well where the main function of that expert is to value the business which one party will be taking out of the marriage on a clean break – I have done hundreds of such valuations - or where an expert is required to opine on the ability of one self-employed spouse to pay maintenance to the other. But where there is serious doubt about a spouse's disclosure, but not bad enough for the court to recognise the need for an investigation by a forensic accountant, two main difficulties arise.

The first is that if the wife or her lawyer thinks that I would be a suitable SJE and puts my name to the other side, I would be typecast as the wife's man, and the husband would want his own man. Result: deadlock, which can be resolved only by one side or the other giving in, or by both sides putting their (wo)man's CV before the court for the judge to decide who shall be the SJE. And that leads to delay and expense.

The point is that an expert can produce a report and give evidence at a hearing only with the court's permission.

Chris Makin

Chartered Accountant Accredited Civil Mediator Accredited Expert Determiner

Civil and criminal experience

as expert for over 20 years in:

Loss of Profit and Consequential Loss

Business & Share Valuations

Partnership & Director Disputes

Criminal & Commercial Fraud

Personal Injury & Fatal Accident

Drug Trafficking etc. Asset

Tracing & Confiscation

Director Disgualification

Section 994 Disputes

Expert Determinations

Matrimonial Valuations

Professional Negligence

Investigations

Chartered Accountant with 20+ years experience as Forensic Accountant and Expert Witness at national firm partner level: Mediator for 10+ years: High settlement rate. See website for more details, including mediation scale of fees.

Mediated disputes in:

- Partnerships Share Valuations
- Company Sale & Purchase **Professional Fees**
- Rights of Way & Boundaries
- Construction
- Intellectual Property
- Professional Negligence **Business Interruption**
- Defamation
- Housing Disrepair
- Very Expensive Motor Cars
- Employment
- Contractual Failings
- Inheritance Act and ToLATAs



N Christopher Makin FCA FCMI FAE QDR MCIArb Call for a **FREE** initial discussion without obligation 01924 495888 or 07887 660072 www.chrismakin.co.uk

There is an alternative: the forensic accountant can act as expert adviser. He is not on the court record, but works in the background, providing assistance to the lady's lawyers. He cannot appear at court (except on the back row, perhaps passing notes to the barrister), and there is no prospect of the husband being ordered to pay any part of that accountant's fees. And the investigating accountant can use only the evidence produced, which may be limited.

So to conclude, if a business valuation is required for a clean break, I can act as SJE as I have done many, many times before. And within limitations, I can act as expert adviser. But for me to act on the record as expert for one party, the other spouse's shortcomings in disclosure would have to be egregious (outstandingly bad or shocking) and if that situation is suspected, I would recommend that the party concerned should speak to their lawyers, not to me, about whether the court might appoint a party expert acting to carry out an investigation.

In fact, what I always do when a spouse approaches me for

help, and the dilemma is whether I could act as SJE or expert adviser, is that I ask them to read this article (it appears on my website as a blog) and then speak to their lawyer. I seldom, if ever, hear anything further. So the job, if it ever was a job, is thrown away. You see, with any case I will not waste your time if it apparent that to pay me for an expert report would be a waste of money.

I remind readers that I offer an initial review of any case without obligation (see "*How long's a piece of string*" on my website <u>here</u>), but that review should be done only when the lawyer considers there is a chance of the court agreeing to have a party expert.

Of course, if a straightforward business valuation is needed, I'm your man!

Biog: Chris Makin has practised as a forensic accountant

and expert witness for 30 years, latterly as Head of Litigation Support at a national firm. He has given expert evidence about 100 times. He also performs expert determinations.

Chris is a fellow of the Institute of Chartered Accountants where he has served on the Forensic Committee, and as an ethical counsellor; he is a fellow of the Chartered Management Institute, a fellow of the Academy of Experts where he serves on the Investigations Committee, and a mediator accredited by the Chartered Arbitrators. He practises as a mediator, from his home in West Yorkshire and his rooms at 3 Gray's Inn Square, London WC1R 5AH, telephone 020 7430 0333. He has mediated 100+ cases so far, on a huge range of subjects, with a settlement rate to date of 80%. For more see his website with videos:

<u>www.chrismakin.co.uk</u> <u>chris@chrismakin.co.uk</u>

The Solicitors' Charity partners with Pennysmart, the Money Advice Specialists, for Solicitors in Need.



The Solicitors' Charity CEO, Nick Gallagher

The Solicitors' Charity is now able to offer more support to solicitors struggling with low income, financial hardship or problem debt.

Clients can get access to free budgeting, benefits and regulated debt advice.

On-going support with achieving financial goals now offered through dedicated caseworkers.

The Solicitors' Charity is pleased to announce a significant expansion in its support initiatives for solicitors with the introduction of an impactful partnership with Pennysmart.

This collaboration extends the charity's current offering, giving solicitors the unique advantage of ongoing expert caseworker support from Pennysmart. This represents a substantial enhancement in the charity's ability to provide tailored and continuous assistance, ensuring solicitors have a dedicated resource to effectively manage their finances over the long term.

Pennysmart provides free-to-client, impartial, confidential money, and debt advice either by telephone and/or digitally, dependent on the client's needs.

In addition to its new financial support partnership, The Solicitors' Charity continues to provide a multifaceted range of support, addressing various aspects of solicitors' well-being, professional development, and personal challenges.

The Solicitors' Charity's CEO, Nick Gallagher said: "I'm pleased to be able to provide solicitors with an additional level of support through Pennysmart. This collaboration will serve as a lifeline for numerous solicitors seeking financial guidance, offering them the tools to regain control of their finances. Pennysmart is not only offering expertise on a range of financial topics, it is also providing one to one support to assist clients in achieving their money management goals. Implementing a plan can be easier when that support is in place and someone is in your corner."

This strategic partnership is great news for the legal profession, offering solicitors throughout England and Wales access to a comprehensive range of financial support and expert debt advice.

Jayne Bellis, CEO of Pennysmart, expressed enthusiasm about the collaboration with The Solicitors' Charity, stating: "We are delighted to partner with The Solicitors' Charity to extend our services to solicitors in need. Our advisory services aim to empower clients in achieving financial resilience by optimising income, minimising expenses, and navigating debt-related challenges through access to effective debt solutions."

If you, or a solicitor you know, needs support, get in touch with The Solicitors' Charity today. Find out more about the charity by visiting www.thesolicitorscharity.org.



Forthcoming Courses

DATE	ΤΟΡΙΟ
19/03/2024	Conveyancing Law Update
22/03/2024	A Court Of Protection Update 2024: how to make an application
16/04/2024	SRA Accounts Rules Update
17/04/2024	Commercial Property Update
19/04/2024	Is it enforceable? Making Agreements Stick
24/04/2024	Public Child Law Conference 2024
29/04/2024	Financial Crime And AML Update 2024
08/05/2024	Loan Agreements: Law & Practice
10/05/2024	Personal Branding for NQ's
13/05/2024	Introduction to Wills & Probate, and Connection with Family Law
15/05/2024	The 2024 Private Client Conference
21/05/2024	Commercial Property: Essential Update for 2024
23/05/2024	Private Child Law Update
23/05/2024	Public Child Law Update

To comply with the SRA's <u>Code of Conduct for Solicitors, RELs and RFLs</u>, all solicitors must keep their professional knowledge and skills up to date. Liverpool Law Society courses will help you maintain an up-to-date understanding of relevant law, policy and practice.

** Training events open to legal professionals nationwide **

For full details, visit: www.liverpoollawsociety.org.uk



Personal Injury Update

with Andrew McLoughlin

Live online: Thursday 9th May, 1.30pm - 4.30pm

This session will provide every practitioner with updated knowledge in the field of personal injury law & practice.

Topics covered include:

- Fundamental Dishonesty review of the last 12 months' cases
- Qualified one-way cost shifting proposed changes
- Road Traffic Accident claims a case review
- Part 36 its impact on personal injury in the last 12 months
- Occupiers Liability an update
- Employers Liability some recent cases
- Official Injury Claim Portal pitfalls and solutions

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Conveyancing Law Update

with Richard Snape Live online: Tuesday 19th March, 1.30pm - 4.30pm

Conveyancing continues to undergo major changes, especially in relation to leasehold and the Building Safety Act continues to cause major problems.

This online course aims to look at some of the issues.

Topics covered include:

- Changes to the Fire Safety Order 2005
- Building Safety Act 2022 and registration of higher-risk buildings
- Building Safety Act 2022 and Leaseholder protections
- Mortgage Company requirements
- Recent case law
- The Renters (Reform) Bill and the abolition of assured shorthold tenancies
- Ground Rent Issues including case law on solicitors
 liability
- Law Society guidance on climate change

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Liverpool LawSociety

A Court Of Protection Update 2024: how to make an application

with Helen Forster

Live online: 22nd March, 1.30pm - 4.30pm

The last 12mnts have seen some significant changes within the realm of Court of Protection, not only in recent case law, but also in the practice and procedure. Whilst these changes are designed to make processes smoother, this update will focus on the numerous changes that have come in and the practical application of each.

This online session will equip busy practitioners with an overview of the key developments in this fast-moving area of law which you can use in your applications.

Covering:

- The new online application system pros and cons
- The New professional deputy standards and what they mean for deputyship practice
- DOLS
- · How to make applications in the Court of Protection
- Recent Case Law and its impact

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Liverpool Law Society

SRA Accounts Rules Update with Linda Lambert

Live online: Tuesday 16th April, 1.30pm - 4.30pm

How confident are you in your knowledge of the SRA Accounts Rules & how to apply them? The SRA expect you to have made decisions on how these rules should be applied in your practice & that such decisions are both followed & also reviewed on a regular basis.

Do you want to check in on the areas the SRA are looking at? Are you aware of the new(ish) SRA penalty fines that can be given, & which can still be applied when you self-report?

This online session will look at the current rules & advice from the SRA, and include a few workshop scenarios. Questions from the delegates will also be encouraged!

There is an expectation within the profession & in particular from the SRA that we (solicitors, staff, and consultants) follow and maintain certain professional standards. To maintain these, we also need to undertake some professional training on a regular basis. Why not make it the account rules for this year?

In the training we will look at all the rules, & will highlight areas such as residual balances, use of client funds, acting as a banker, billing & the proposed changes to Rules 4 and 10 that have for now been postponed.

For more information or to book, click here



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Please Don't Share...

Here at Liverpool Law Society we price our events as reasonably as we possibly can & any small surplus generated, is a vital contribution to the ongoing costs.

The price for each training event is clearly displayed on our website. This is per delegate.

If booking an online or a hybrid event (virtual attendance) the viewing link is intended for the named delegate only. When viewing, please do not share your screen with others. When links to recordings are sent, again these are intended for the named delegate only - please do not share this link with others.

If you have colleagues who are interested in the same event as you, please get in touch, as we are always happy to discuss group booking discounts, or possibly a tailored in-house session may even be more cost effective depending on numbers.

Remember, whilst it's nice to be nice, with regards to LLS online training events, please do not share!

Jo Downey (she, her) Director of Education & Training, Liverpool Law Society Training | Liverpool Law Society



Social Media Highlights

Each month we will be bringing you a selection of the latest social media posts by Liverpool Law Society and its members.





Morecrofts LLP @Morecrofts - 15 Feb Today we're putting our team of accredited children panel solicitors in the #MorecroftsPeople spotlight. We have more of these than any other firm in the Liverpool city region and pride ourselves on their expertise. Meet them here morecrofts.co.uk/senvice/childr... ##amilyLaw





If you have an interesting tweet to share, why not send it to us, clearly labelled 'Social Media Page': <u>editor@liverpoollawsociety.org.uk</u>



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