

May 2024

Liverpool Law

Liverpool  Law Society

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



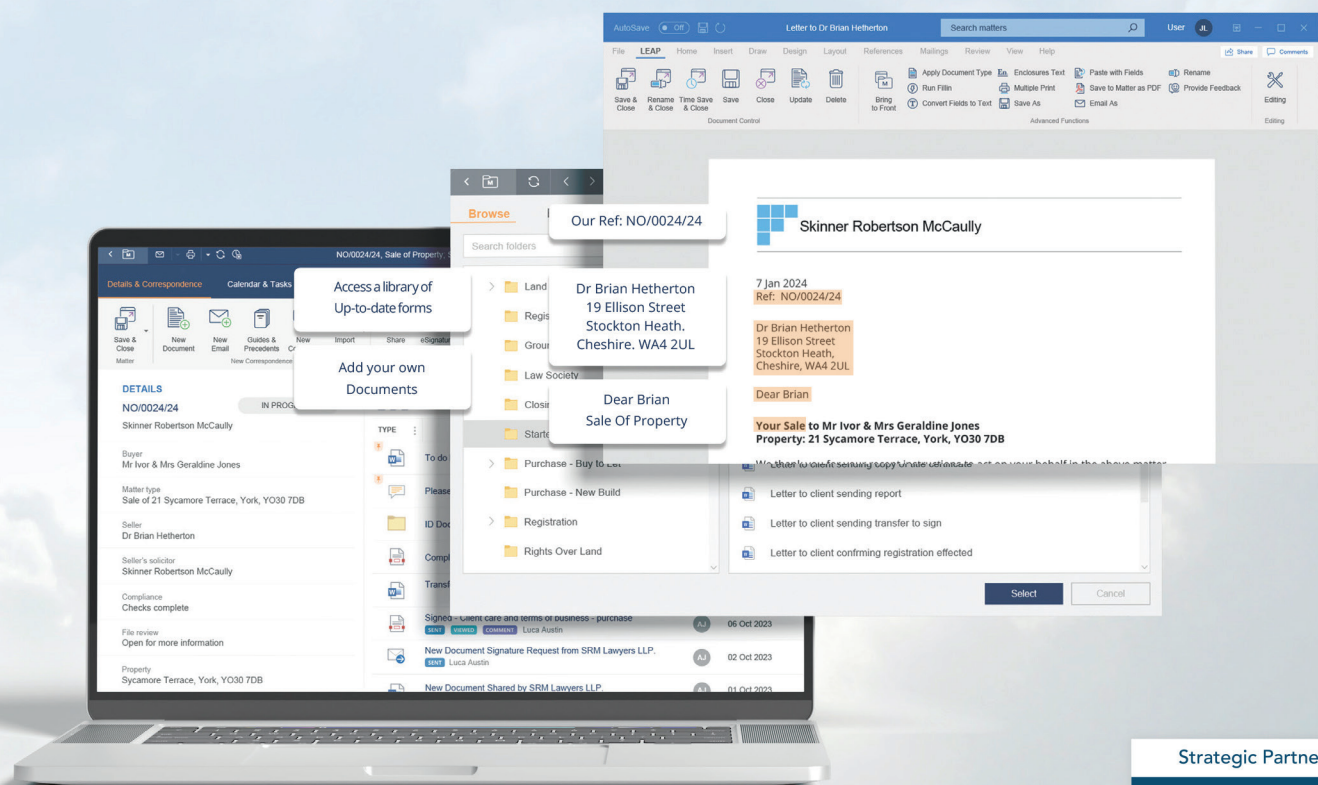


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May 2024

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DEADLINES

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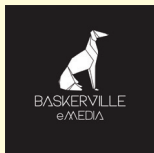
Liverpool Law Society Magazine is produced by and for Liverpool Law Society Members. This is our opportunity to share our news, events and celebrations with our friends in the legal community.

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 editor@liverpoollawsociety.org.uk

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Editorial Committee Dates 2024

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

21.05.24
18.06.24
17.07.24
20.08.24
17.09.24
15.10.24
19.11.24

Welcome to the May edition of Liverpool Law



I would love to say spring has finally arrived and it feels warmer but I personally still think it is cold, or I should say “freezing” as my LLS colleagues mocked at the quiz recently! This was a fantastic event and well done to all those who arranged it. I contributed to our team more than I expected to but the trophy ultimately went to the hybrid team of LLS/ MJLD members, who cannot be named for legal reasons, the reasoning for which is wonderfully explained in their article. Many congratulations to you all.

You will also see this month that we have a Leaders in Law article from our Past President and former Editor, **Alison Lobb**. It is no surprise for me to read of Alison's nurturing of the future talent at her firm as she was very kind to me when I joined the Editorial committee back in 2017. Despite having no previous involvement in Liverpool Law Society and joining the committee whilst preparing for maternity leave, Alison was always encouraging and supportive of my role. Please do take the time to read of her plans for Morecrofts and if your firm would be interested in featuring in our Leaders in the Law column please get in touch.

Finally we have an article detailing the new Managing Partner at Weightmans, **Pete Wake**, and the stepping down of **David Lewis**. Again David was always very supportive when I held the role of Chair of the Liverpool office's social committee and was always such a great participant in our events. Most memorable for me was David writing make shift P45s for the social committee members on the back of beer mats when he didn't win the treasure hunt that year! I wish him the best of luck in his consultant role and I have no doubt Pete will be a success in the role.

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 April's General Committee meeting.

There were 6 individuals from the following organisations:

- | | |
|-------------------------------|----------------------------|
| • Alison McCormack Solicitors | • In-House Legal Solutions |
| • Carton & Co | • Irwin Mitchell LLP |
| • DWF LLP | • Paul Crowley & Co |

Liverpool Law Society's membership now exceeds 2,580 individuals from 175 law firms, barristers' chambers, and other organisations with legal professionals in the Liverpool City Region and beyond.

From the President

The latest from the President, Gaynor Williams

It has been another busy month, and it is hard to believe that we are heading into summertime, albeit as I write this column it feels like winter has returned.

One of my tasks this month was to have the President's jewel engraved to add **Jeremy Myers** and my name onto it. I am very honoured to have my name engraved on this spectacular jewel while I am still in post. To those who have not seen the jewel, there is a Liverbird on the front surrounded by an inscription. As we know, the Liverbird is a symbol of Liverpool, however there is more to the jewel. Attached to the back of the jewel is an expandable 'fan' that contains the names of all of the Presidents of LLS dating back to 1897. Aside from the jewel being a symbol of LLS, it is also a piece of our history.

After the early Easter break, I accepted invitations to various events and I continue to meet new and 'old' members on my travels. On 12 April 2024 I thoroughly enjoyed a morning behind the scenes at Liverpool County Court, contributing to their student legal diversity group event. It was very interesting to hear from the Judiciary, Counsel, and the Court's support staff about the work that they do. The students clearly enjoyed the day and asked some very good questions. Thank you to **Usha Sharma** from Brabners and **District Judge Guirguis** for the kind invitation. I look forward to the next event.

On 18 April 2024, together with Officers and Directors, I attended Merseyside Junior Lawyer's Division's Quiz night at the Bierkeller, Liverpool. As in recent years, it was a well-attended event and there were lots of competitive teams. Thank you to **Alum Ullah, Jennifer Powell, Nichola Halpin** and **Nathaniel Dirnhuber** who formed the LLS team and congratulations to **Nina Sahu** and her team from Hill Dickinson for winning the MJLD quiz winner's shield this year!

A highlight for me this month has been the Past President's dinner that was held at The Athenaeum, Liverpool on 19 April 2024. It was truly an honour to spend the afternoon in a room full of the most influential and talented lawyers who have led LLS throughout the years. Thank you to all of the past presidents for listening to my quarterly report, and being very kind to me.

I am looking forward to welcoming everyone to the Lawtech UK training event that is being held at Weightmans on 24 April 2024. This event covers law and technology and with the speedy progress of AI I am keen to learn more about technology and its involvement in the future of law. On the subject of training and events, LLS are always open to any requests for courses that our members would like to attend. We have a training forum that our member firms can contribute to, in particular, we invite junior lawyers to get involved and to tell us about what training events you would like to see. Please get in touch with me or **Jo Downey** about any training ideas you have.



After the Lawtech event, the same day, I am visiting the School of Law and Social Justice at University of Liverpool, to celebrate the work of the clinic over the past year and to congratulate the outstanding contributions from all of the students. This is always a positive and enjoyable evening, meeting the next generation of lawyers and hearing about how the clinic has helped people from the Liverpool city region.

Looking forward, next month I have a trip to Leeds Law Society's Annual Dinner, a visit to Fletchers Solicitors offices in Liverpool and a face-to-face General Committee meeting, which I am looking forward to. Online meetings are very convenient, but it is good to see everyone face to face, and we have Local Solutions Charity coming along to tell us about their work.

We still have a few team spaces for the LLS Golf Tournament at Caldy Golf Club on 6 June 2024. If you have any budding, or keen golfers, of any ability, book a team on, it looks to be a fun filled day followed by an evening meal and prizes.

Remember to save the date for the Annual Dinner and Legal Awards on 14 November 2024, **Lady Hale** is the speaker, and I am sure there will be a lot of demand for tickets.

Gaynor Williams
President

president@liverpoollawsociety.org.uk

LLS Meetings & events – May / June 2024

Date / Time	Meeting/Event
14/05/2024 12:30	General Committee
16/05/2024 13:30	Future Planning Sub-Committee
17/05/2024 10:00	Joint Forum on Access to Justice
21/05/2024 13:00	Editorial Sub-Committee
29/05/2024 13:00	Equality, Diversity & Inclusion Sub-Committee
04/06/2024 12:30	Finance & Policy Sub-Committee
06/06/2024 12:00	2024 Golf Tournament
11/06/2024 12:30	General Committee
13/06/2024 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 members of Liverpool Law Society. To enquire about your membership status and/or being co-opted onto one of the above committees, please email committees@liverpoollawsociety.org.uk

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 committees@liverpoollawsociety.org.uk

Committee	Consultation Paper title	Closing date
Criminal Practice	Aggravated Vehicle Taking Offences	22.05.24
Regulatory	Improving the effectiveness of the Money Laundering Regulations - GOV. UK (www.gov.uk)	09.06.24
Criminal Practice	Immigration offences – consultation	12.06.24
Regulatory	https://www.sra.org.uk/sra/consultations/discussion-papers/consumer-protection-review/	01.07.24

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Leaders in Law: Alison Lobb, Managing Partner at Morecrofts Solicitors



1. Briefly describe your role as Managing Partner and the main duties of this position.

As managing partner, I wear many hats. The key part of my role is the overall oversight of the firm, its strategy and direction, as well as being the external facing figurehead, representing the firm at events, meetings and discussions. I am responsible for client care and compliance, being the COLP; and oversight of training and marketing also fall under my remit.

2. What are the positive and negative aspects of the role?

It is always rewarding to see the firm grow and progress, and I particularly enjoy training and developing people and seeing them thrive, and that always brings me great pleasure. I love talking about Morecrofts, our history and what we do, and introducing our people and brand to new audiences. I particularly enjoy writing and speaking about my role, about leadership and the lessons I have learnt along the way, and I love being able to develop new initiatives and having the leeway to do that.

The negative side is that the buck stops with me! I am always conscious of that in all aspects, but particularly in respect of regulatory matters which seem to become more onerous as time goes on. It is fair to say though that the positives do outweigh the negatives!

3. What changes to the running of the firm have you implemented because of Covid?

There were of course a lot of downsides and sadness to Covid, however for us there were also very many positives

and it forced us to bring forward changes which we had had on the “to-do” list for far too long, and most of those have now become embedded into our ways of working. We were fortunate in that we had very recently invested in an upgrade to our communication systems which enabled us to get everyone online and working remotely, straightaway, and available by phone as if they were in the office, and some of our team found that revelatory. It forced those who had been kicking against the introduction of paper-lite or paperless working to think again to appreciate the benefits, to make full use of our systems and realise what technology could do. It made even the biggest technophobes adopt the use of Teams and Zoom and introduce methods of working which still benefit us and our clients today. It made our decision-making slicker so that we focussed on what was really important. It also stimulated us to bring in a full flexible working policy.

4. As a result of Covid, what are your new agile working policies and why?

I had always been a fan of flexible working done properly, and for concentrating on outputs rather than presenteeism, and before Covid we did have a few fee-earners who worked from home up to one day a week, and we had always been flexible with allowing time off to attend appointments etc. where time could be made up elsewhere, but in general, remote working was a rarity. Not only did Covid introduce all our team to the technology which made remote working as easy as working in the office, but it changed mindsets and showed that for some people, remote or flexible working could be just as, if not more, productive, as being in the office all day.

After we were able to return to the office, we waited to see how it worked for our people and let everything settle to allow our teams and individuals to find their best ways of working. We then used what we had learnt as a basis, and developed a very flexible, team based policy, in which we expect most team members to be in the office a minimum of one day a week, and more often if they have trainees or apprentices working with them. We also allow considerable flexibility in the hours worked, so that, for example, people can work around school pickup & drop off. We have some exceptions to the rule, and some support staff who now work wholly remotely, and of course there are many office-based roles which can only be done on-site. We have found that many of our staff prefer to be in the office, surrounded by colleagues, and most know where and when they work most productively.

Our principles are that the working pattern needs to work for our clients, the business, other team members, and then our staff themselves, and in that order. The flexibility we have been able to offer means that we even have one member of staff now working for us from Australia, having emigrated last year. Ultimately, it's a system based on trust, and we know that if our staff feel trusted, valued and respected, they pay us back in abundance.

5. What do you see as your biggest challenges?

At present, I think one of the biggest challenges we face is looking after our people, whilst keeping the business as profitable as it needs to be. As a firm which has almost 40% of income deriving from publicly funded work, the pressures grow year on year. As we all know, there has not been an increase in legal rates for 18 years, and in fact they have been cut during that time. Much of the work we do is complex and needs solicitors of considerable expertise and skill, but there is a limit to how long this situation can be maintained on the rates paid for the work, and that has consequences not just for our business, but also for the most vulnerable in society. In other areas, too we have seen a considerable increase of work, and we need to be very careful to monitor the workload and ensure that our team members are not overwhelmed, and that we can encourage good people to join our team

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

I am really proud of our lawyers and their expertise, in all areas of work. I am really proud of the way we train and develop people in all areas of the firm, not just lawyers, and also of the fact we are 80% female with a female dominated partnership and management team, which is still unusual in the legal profession. I am proud of our brand and our marketing team who have worked so hard to position us in the marketplace, and enable us to run the Merseyside Business Awards which in turn support and celebrate the independent business community year on year, and contribute to the local economy. I am proud of the fact that whilst the firm is 211 years old, we are forward thinking and always looking to innovate wherever we can, and also that we are seen by our staff as such a great place to work, and that we have always put our people first.

7. What are your immediate short-term goals?

We have seen a period of steady organic growth, enhanced by some strategic lateral hires, and we want to continue that over the next few years. We have a strong internal focus on our people, and I am keen to introduce as much training and development for them as possible, to enable them to acquire the skills to lead the firm in the future, some of which might be very different skills to those needed today.

8. Where do you see the firm ten years from now?

I very much hope that Morecrofts will not change too much in

the next ten years in its ethos and offering. We have recently promoted a cohort of five new partners and I am really looking forward to seeing them progress and grow as leaders within the business, as they are already bringing new perspectives and driving deeper discussions around the partnership table. I would like to see further growth, but not at the expense of our values of being a "Morecrofts family" who respect and are honest with one another and our clients. I also hope that we can continue to serve the most vulnerable in our society within a suitably funded legal aid system enabling proper representation and access to justice for all.

9. What legacy, as Managing Partner, would you like to leave the firm?

During my time as Managing Partner one of the things which has been really important to me has been the creation of a transparent promotion structure for our fee-earners, beginning with the establishment of a formal trainee application process, through to specific criteria and structured applications for promotion to associate and senior associate, and then last year with our Morecrofts Development Programme which offered an intense training course and assessment process for progression to partnership. Of course, these things must change and adapt over time, but I very much hope that this structure will remain and enable future generations of Morecrofts' people to follow their career journey within the firm.

Apart from that, I hope that when the time comes, (and I hope that will be some time away yet) I will feel able to walk away knowing that I am leaving the business in a better shape than I found it, and that the next custodian of this historic firm will nurture and care for it as much as I have done.



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Weightmans elect new senior partner, as David Lewis retires



David Lewis

National law firm, Weightmans, has elected a new senior partner, Peter Wake, after David Lewis retires following six years in the position.

Peter joined the firm in 2001 as a trainee solicitor and has been here ever since. Based in the Liverpool office, he became a partner in 2011, an equity partner in 2016, and was head of local government litigation for many years. After being elected by equity partners, Peter began a three-year term from April 1.



Peter Wake

The news comes as David retires from the equity partnership after almost 40 years at Weightmans, although he will remain with the firm as a consultant, to service long-standing clients and to continue to contribute to the ongoing success of the regulatory department, which was his vision some 20 years ago.

John Schorah, managing partner at Weightmans, said:

“David’s contribution to Weightmans over

the last 40 years has been immeasurable – and his professionalism and dedication to the firm’s continued success is an example to us all. I want to thank him personally for what has been an outstanding tenure here at Weightmans, and I am delighted that he will continue as a consultant for the firm.

“Like David, Peter is also Weightmans through-and-through, and I know he will work hard to implement the firm’s culture and values as we continue our aim to be a Top 30 law firm.”

David became the firm’s national senior partner in May 2018, having previously been head of the firm’s national regulatory department (2004-2018) and a regional office head, first in Liverpool and later in Leeds (2007-2018). He had been the firm’s national deputy managing partner (2000-2003) and its regional office managing partner in Liverpool (2003-2007).

After joining Weightmans as an articulated clerk in 1985, David qualified in 1987 and was made a partner in 1992. After qualification, he spent many years handling both civil and criminal litigation for insurers and their policyholders, before becoming a founder member of the firm’s dedicated regulatory services Unit in 2004.

Sub-Committees Social at 5.15pm on Thursday, 13th June 2024

Dear LLS Committee members

Due to the popularity of the Sub-Committees Socials which some of you have been unable to attend on past occasions, there will be another informal, in-person get-together for all LLS sub-committees and their members. This will take place on Thursday 13th June from

5.15pm onwards.

It is a chance for all to come together, to meet one another in a relaxed atmosphere. It will take place in **The Atrium Room**, The Tempest on Tithebarn, 12 Tithebarn St, Liverpool

Haley Farrell, chair of the Society’s

Family Business Sub-Committee, is once again organising the venue. So that she has an idea of the number of attendees, please register your attendance to committees@liverpoollawsociety.org.uk

We hope that many of you can make it. Please note that this social event is not funded, there will be a cash bar available.



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Alex Wins Award for bringing Dutton Gregory to Liverpool



Dutton Gregory's Liverpool Ambassador, Alex Gregory-Chialton has been named 'Business Development Champion of the Year' at a prestigious ceremony celebrating the work of property lawyers in England and Wales.

The 4th annual British Conveyancing Awards, hosted over 400 property professionals at a glitzy ceremony at 8 Northumberland Avenue, London.

The awards recognise and celebrate excellence across providers of home moving legal services and ancillary services. The rigorous entry process requires organisations to submit evidence of their approach to people, technology, process, professional development, and technical excellence.

A panel of expert judges, drawn from across legal and the wider property profession, independently review the entries, identifying those organisations who are deemed to have gone above and beyond their peers in supporting their clients and

leading the way in the industry. The top scoring firms in each category are shortlisted ahead of the ceremony during which the winners and highly commended are announced live on the night.

"In the year since Alex joined us, she has worked tirelessly and with tremendous success to prepare, launch and establish our Liverpool office," says Paul Sams, Managing Partner of Dutton Gregory Solicitors. "We are delighted and proud that her achievements have been appreciated as much by the industry leaders judging this category as all her colleagues here at Dutton Gregory."

"I didn't expect to be shortlisted, let alone win!" said Alex. "I want to thank the entire team for all of their hard work and support, we're moving mountains together and have been through so much in so little time!"

The British Conveyancing Awards is hosted by Today's Media, the publishers of trade publication Today's Conveyancer, an online news publication for property solicitors, conveyancers and property practitioners.

"In its 4th year The British Conveyancing Awards is established as a nationally recognised barometer of excellence," says David Opie, Managing Director of Today's Media. "The stringent criteria and comprehensive judging process, which includes assessment of technical excellence and customer service reviews, means that those who are shortlisted, and indeed the winners, can be hugely proud of their achievement."

A British Conveyancing Award is something hard earned and hard won."

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Spotlight on: Pamela Chesterman



Pamela Chesterman, who is a partner in Irwin Mitchell and a member of their Planning and Environmental team, has been elected as a Director of Liverpool Law Society for 2024.

Pamela is originally from Aintree and is a former student of Maghull High school. After leaving school, Pamela studied law at the University of Pontypridd, now part of the University of South Wales. She had always wanted to study Law having completed some vocational work in the local council through her family who both worked in the claims department.

This sparked her interest in Local Government Law and having seen the breadth of skills involved including advocacy and drafting, criminal and non-contentious law, Pamela felt that planning was the most appealing area.

Her interest in planning grew whilst at university; after finishing her LLB and LPC in Wales, Pamela's first job was as a cost draftsman in Ormskirk and from there a position became available with Berryman's Lace Mawer as a paralegal. After a year, Pamela took a training contract with Tameside Council where she qualified. One of her early cases included Trial Advocacy for a breach of dog fouling legislation which she won. Tameside council unfortunately only had a position in the Child Protection team at the time Pamela qualified as a solicitor and having done some child protection work during her training contract decided that this was not the area of law she wanted to work in. At the same time, there was a full

time position at Chester City Council (now Cheshire West and Chester Council) in the planning solicitor role, so Pamela relocated to take that post. Working alongside one other senior planning solicitor within the Council's legal team Pamela focused on the enforcement side, dealing mainly with fly tipping, leafletting and illegal adverts displayed on vehicle stationed along motorways etc.

After two years with the council, in 2007 she went into the private sector joining Halliwell's. Having learned a great deal from working for the a local authority, Pamela wanted to put her knowledge to use for private practice clients. After Halliwell's, she then moved to HBJ Gately Wareing, where she assisted developer clients prepare, negotiate and complete various legal agreements in order to secure planning permission for their sites. During the same period, Pamela also joined The Association of Women In Property for the North West as an event coordinator.

After a period at DWF, Pamela took a consultancy role at West Lancs Council, working within the legal team, advising the planning committee as well as working on freedom of information and GDPR. During this period the Council had a voluntary undertaking with the Information Commissioners Office (ICO) following a data breach. Part of her duty was to introduce a retention schedule to help the council comply with this undertaking, which she did including training officers on its implementation.

After a few years with West Lancs Council, Pamela then moved to Cheshire East Council, before accepting a permanent role as Lead Legal Adviser in the Planning & Environment Legal Team at Cheshire West. This was followed by a return to private practice with Prosperity Law in Liverpool where Pamela was Head of Planning and then a brief move to Brabners before joining the planning and environmental team at Irwin Mitchell which is her current role.

What Pamela likes about the planning

sector is that they are a collegiate group, where professionals can contact each other to check legal points. There are always government changes coming through, so it's important to double check all details. One great thing is that you can call anyone in the sector; barristers, consultants other lawyers and they are happy to consider and debate new areas of law or complicated details as everyone is keen to get to the bottom of new changes coming through!

In addition to her Directors role, Pamela is on the property committee at Manchester Law Society, as she works across Irwin Mitchell's Manchester and Liverpool offices and is helping to organise an annual seminar in September for them. Pamela has only recently become an active member of Liverpool Law Society and was keen to take the directors role as she is already on the Merseyside Women's Lawyer Division Committee. She has also rejoined The Association of Women in Property North West Committee, this time focusing on organising and hosting events in Liverpool alongside her other Liverpool Committee Members.

Her aims as Director are to try and raise the profile of planning and environment law and its interplay in the City primarily, to assist her own work but also contribute to the continued success of her home-city.

Pamela is a member of the non-contentious business committee and wants to see more consultations on planning and environment coming through from the main Law Society, as a great deal of government change continues and Lawyers need to be prepared for the challenges this will bring.

Outside of work Pamela relaxes by walking her dog, Poppet, who is a mini Schnauzer. Pamela and her husband are season ticket holders for Liverpool FC and she has recently taken up Golf, having bought all the equipment and had a couple of lessons, so is hoping to play a few rounds during the summer.

We wish Pamela every success in her role as Director for this year.

Liverpool Law Firm Director Cross-Examines Business To Refocus Growth Strategy



The Glenville Walker board



Hazel Walker

A Liverpool-based law firm has futureproofed its business and opened a new revenue stream, thanks to skills learned through the Help to Grow: Management Course.

Glenville Walker was founded in 2017 by managing partner **Denise Walker**, alongside director and group CEO, **Hazel Walker**. The family-run law firm specialises in corporate, litigation, dispute resolution, commercial and residential property, and advises SME businesses of many different sizes and specialisms across the UK.

The firm spent its first five years building a strong portfolio of clients, winning new business, and investing in talent to build a team of 18 legal experts. It was at this point that **Hazel**, **Denise** and their senior management team realised that to keep growing successfully, they needed to put more robust plans in place to cope with increasing demand. **Hazel** and **Denise** also wanted to ensure a clear succession plan was in place, by building a strong management board to help steer future

development strategies for the firm.

To capitalise on new growth opportunities and create a robust plan to futureproof the business, **Hazel** decided to enrol on 12-week Help to Grow: Management Course which is designed to help business leaders and senior managers increase resilience, innovation and growth.

The course was delivered by the University of Liverpool's Management School – a recipient of the Small Business Charter accreditation that recognises institutions that support small business – and gave **Hazel** the skills needed to implement a robust succession plan and enhance the firm's business strategy.

Hazel also learned how to effectively communicate, guide, and manage expectations of the senior management

team, utilising case studies from the course. This resulted in the appointment of two new board members – a vital part of the new succession plan – and the launch of a litigation and dispute resolution department. This additional service has opened a new revenue stream for the firm and enabled it to increase its range of services so that it can now provide a one-stop-shop of specialist business advice to clients, removing any previous need to outsource support to external consultants.

The additional service has also helped contribute towards the firm's 38% increase in fee income over the course of the past financial year.

Hazel Walker, Chief Executive Officer at Glenville Walker, said: "Denise worked at one of the region's most prominent law firms for 27 years, so growing up, I was familiar with the legal sector and we

thought it would be great to combine her legal expertise and my business acumen and start our own business together.

"We wanted to break the mould of traditional legal practise and provide clear, tailored, solutions driven advice and support to help owner managed businesses thrive across the UK. We value our client relationships which enables us to intrinsically understand the needs of their businesses. That is why we designed the firm to act as an extension of our clients' in-house teams. While growth has always been on the agenda, we wish to stay in the SME market to allow us to remain in-tune with our loyal clients. Our main objective is to continue to add to our specialist services for the benefit of our clients' experience and to target new markets."

"Following on from our initial success, we knew we needed to formulate a strategy

for future growth. Thanks to the Help to Grow: Management Course, I've been able to change the mindset of our senior team to help us expand our revenue streams. I've always wanted people to see me for my talent and passion for the business, not just as a family member at the firm, so it's important I can effectively communicate the changes I feel are best to push the business forward."

"We want to inspire and invest in the next generation of talented business lawyers, so having a plan in place now is essential especially if we want to prepare them for management. The course gave me the confidence to deliver new ideas in a factual way to the board, and to bring real change in the business, not least to start to implement the succession plan. Finding a way to communicate clearly has really helped the senior team to plan ahead and I'm excited to continue bringing ideas to the table to drive future growth."



Denise Walker

Three new senior associates among latest promotions at Morecrofts



Vicki Morris

Morecrofts Solicitors has promoted three senior associate solicitors within its private client and litigation teams.

Vicki Morris and **Michael Gossage**, who both completed their training contracts with Morecrofts earlier in their careers, join highly experienced litigation specialist **Derek Dawson**, who joined the firm in 2017, in stepping up to the new role.



Mike Gossage



Derek Dawson

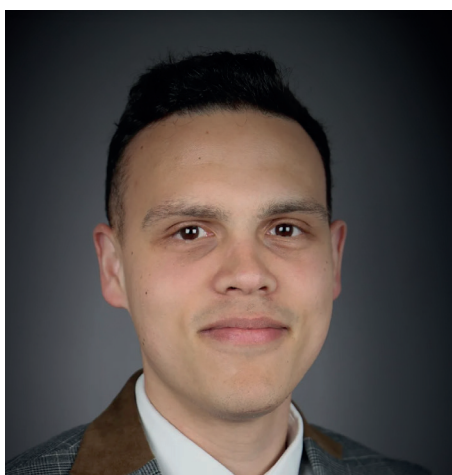
Meanwhile, **Faye Kavanagh** and **Freja Hopwood** are set to begin their training contracts in the private client and family law teams, respectively.

Last year, Morecrofts created a new management training programme aimed at equipping lawyers with wider business skills such as finance, HR and compliance, and providing clear senior pathways of succession within the business.

Alison Lobb, managing partner at Morecrofts Solicitors, said: “*Vicki, Michael and Derek have each played a significant role in the continued success of our business, both in financial terms and the quality of our service delivery to clients.*”

“These latest senior promotions offer further evidence of our commitment to helping excellent lawyers to achieve their professional ambitions with us and gain the experience and expertise needed to take the business forward into the future.”

“With every promotion and appointment, we continue to create a law firm with a unique identity and personality; one which empowers individuals to pursue a successful career within a supportive environment and positive team culture, while maximising their freedom to enjoy their personal time away from work.”



Aaron Ocquaye

Morecrofts is also delighted that all three of its recently qualified solicitors have accepted roles within the firm. **Aaron Ocquaye** qualifies into the personal injury & clinical negligence team in Liverpool city centre, **Hannah Beardmore** joins



Hannah Beardmore

the family law team in Wirral and **Josh Bourke** qualifies into private client, based at the firm’s Woolton office.



Josh Bourke

Costs drafts person **Katie Ward** has been promoted to manager of the firm’s thriving fee unit.

TALKING TO THE NEXT GENERATION ABOUT MONEY

Thursday 13 June | 11.00am - 12.00pm | Online

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

Join us for an insightful webinar to discuss how family gatherings can be used to talk to the next generation about money.

Led by experienced financial experts, this webinar provides information on how to approach the conversations around your financial plans with those closest to you.

Find out more and register

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Leading law firm continues expansion with two new offices



A leading all-service law firm is expanding its footprint by opening two new offices in Chester and Birmingham, marking a significant milestone in its continued growth.

With a rich history of delivering expert legal services for 36 years, the new city centre offices will be the fifth and sixth locations for MSB Solicitors, which currently employs 220 people.

The decision to establish a presence in both cities comes as the firm continues its exceptional growth trajectory, having doubled its team headcount and turnover since 2018.

MSB Solicitors will be looking to recruit solicitors, paralegals, and trainees across all areas of the legal profession at the offices. This strategic move reflects the

firm's commitment to serving the growing demand for legal services in the cities.

Each office will provide clients with expert advice and representation, serving the entire community – from international corporations to start ups, from ultra net-worth clients to the most vulnerable.

Emma Carey, Managing Partner at the firm, believes that this growth trend will continue, as the firm solidifies its position as a top-tier legal service provider.

“As an all-service law firm, we pride ourselves on our excellence and that is undoubtedly reflected in our growth,” said Emma.

“Since we opened our Manchester office just two years ago, our team has expanded

by a huge 250%, and we aim to replicate this success in Chester and Birmingham.

“This will allow us to further expand our reach, providing clients with the high-quality legal services they deserve. We look forward to being a part of the community in both areas, contributing to the growth and success of each city.”

MSB Solicitors is listed in prestigious rankings including Tier 1 Legal 500, Band 1 Chambers and Partners and The Times Best Law Firms. The firm's expansion into these markets is a testament to its success and reputation for excellence in legal services.

For more information about MSB Solicitors and its services, visit: www.msbsolicitors.co.uk



Merseyside Junior Lawyers Division Quiz Report



On 18th April 2024, MJLD members gathered at the Bierkeller for our annual quiz, in partnership with Liverpool Law Society.

It was a fantastic evening organised by our Social Representatives, **Callum Waterhouse**, **Lauren Cave** and **Eve Stott**, along with **Krysztie Zakrzewska**. Thank you to **Jemma Castell** and **Beth Walker** for putting together a fantastic quiz to be played on the night.

We also wanted to take the chance to thank all members from MJLD and LLS for coming to the event. It was a huge success with 150 people in attendance.

Congratulations to this year's winners from

Hill Dickinson with their team 'Those who cannot be legally named'. Bond Turner took 2nd and 3rd place this year with their teams, 'Izzhe Guilty' and 'C for Sierra'.

We would like to give a special mention to Cape Clarke who sponsored the event and without them it would have not been possible, so thank you on behalf of MJLD and LLS. MJLD look forward to working with Cape Clarke in the future!

Well done to everyone that took part and we can't wait to see you all for next years quiz. Keep an eye out for some exciting news from the MJLD Committee coming soon.

Lauren Cave



MJLD v LLS Quiz: The Winners - Can't Be Named for Legal Reasons



The team holding the trophy/shield (missing Georgia Garland)

L-R: Kelly Miller, Kieran Westhead, Harris Chaudhary, Josh Evans, Elizabeth Ellis, Emma King and Nina Sahu

Yes, you read the title right, we can't name the winners of the annual MJLD v LLS quiz for legal reasons. Only kidding, that was actually our team name (who says lawyers can't be funny?!). After spending a whole five minutes choosing our team name, our group from Hill Dickinson LLP sat down at Bierkeller on Thursday 18th April to argue over the answers to a sheet of Dingbat puzzles and celebrity baby photos.

In order to answer the Dingbat puzzles, we channelled our inner Roy 'Say what you see' Walker and that was weirdly a very successful strategy. The celebrity baby photos were a bit easier for our group since celebrity gossip was a

particularly strong area for some (again, can't be named for legal reasons) who, by their own admission, spend too long on Instagram.

After conquering the early paper rounds, the next round of general knowledge went smoothly although given our team was from Hill Dickinson LLP we really should have known the name of the sister ship of Titanic (where are all the shipping lawyers when you need them?). This was followed by a round of sport which was an easy match (see what we did there?).

We thought we would struggle with the 'Legal' round but luckily, one of our group (again, can't be named for legal

reasons) is so old that she knew that Claimants used to be called Plaintiffs. Again our knowledge of TV shows helped to name 'SVU' in Law and Order. The younger members of our group danced through the music round and we managed to hold our nerve with the 'Random' round to finish.

This left a nail-biting tie breaker before we were announced the winning team! Having had no expectations of actually winning the quiz, we had to break the news to both MJLD and LLS that we were a hybrid team. Thank you to MJLD for hosting and to Cape Clarke who sponsored the event.

Nina Sahu

Brabners Launches Charity Allotment As Part Of £25,000 Social Regeneration Partnership With Rotunda



Leading independent and purpose-led law firm Brabners is supporting Liverpool-based community hub users through the development of a new allotment and kitchen garden in partnership with social regeneration charity Rotunda.

Brabners, one of the first B Corp's in the UK legal sector, is investing in the development of the new allotment in the grounds of Rotunda's Kirkdale base as part of a broader £25,000 commitment to the charity, which provides education, training and skills development services to adults in North Liverpool.

Rotunda works with more than 2,500 people a year – providing career-building courses and vocational qualifications. Its service users can also access its onsite nursery, bistro and wrap-around support including mental health, wellbeing, legal and debt advice. Brabners' funding will support these services, while its employees develop and maintain the allotment alongside Rotunda's service users.

The partnership was launched with almost 20 Brabners colleagues in the past month supporting the transformation of the space as part of a number of volunteering days.

The investment forms part of Brabners' mission to make the difference to its clients, people and the communities it serves. Led by its grant-making charity, The Brabners Foundation, and its employee-led social impact groups, the firm intends to establish similar partnerships with charities local to its three additional offices in Manchester, Lancashire and Leeds. As well as supporting a range of employee-nominated charities, Brabners also continues to be involved in the Great North Bog programme, having invested £50k to unlock £550k of grant-funding for a major peatland restoration project

in the Yorkshire Dales in 2022.

Joe Shelston, employment partner and part of Brabners' sustainability and environmental group (SEG), said: "We firmly believe in business bringing about positive change – including supporting the development of skills and ensuring employment pathways are accessible for those in disadvantaged communities.

"Rotunda makes a huge difference to the lives it touches, and we're looking forward to seeing the impact the new allotment has as we work with service users to maintain the space, boost their confidence and wellbeing, and help develop transferable skills. Not only will this support a fantastic cause in our community, but our colleagues will enjoy seeing their own ideas come to life while volunteering at our first allotment project, learning new skills whilst working in partnership with the service users and team at Rotunda."

Maxine Ennis, CEO of Rotunda, said: "Rotunda are delighted to have Brabners support, they are an amazing bunch of people helping us breathe new life into our kitchen garden giving local people the opportunity to grow their own healthy food from 'Plot to Pot'.



Lady Chief Justice Endorses Inaugural Pro Bono Recognition List for Solicitors and Barristers in England & Wales

PRO BONO RECOGNITION LIST ENGLAND & WALES

9 April 2024, LONDON – The Attorney General’s Pro Bono Committee is proud to announce the launch of the inaugural [Pro Bono Recognition List of England & Wales](https://www.liverpoollawsociety.org.uk/pro-bono-recognition-list), designed to recognise the pro bono commitment of the legal profession. The Recognition List is now open for submissions, with solicitors and barristers across the country invited to submit their names to join The Recognition List and be recognised for the valuable contribution they make in providing pro bono legal help to those in need.

The Pro Bono Recognition List, published annually, is open to solicitors and barristers who have dedicated 25 or more hours of pro bono legal assistance in the previous calendar year. The Pro Bono Recognition List is supported by its patron The Lady Chief Justice of England & Wales, Baroness Sue Carr of Walton-on-the-Hill.

Private practice and in-house lawyers are invited to submit their names via the website before the 24 May 2024 deadline and law firms and organisations wishing to submit multiple lawyers are welcome to do so. Solicitors and barristers are eligible if they appear on the Solicitor’s Register and Barrister’s Register.

Set up under the sponsorship of the Attorney General’s Pro Bono Committee, with the support of the Law Society, Bar Council and all major pro bono legal organisations, the Recognition List aims to shine a light on the individual lawyers at firms and organisations of all sizes who are at the heart of providing pro bono across the jurisdiction.

Commenting on the launch of the initiative, **The Lady Chief Justice of England and Wales, The Baroness Carr of Walton-on-the-Hill**, said: *“I am delighted to announce the launch of the Pro Bono Recognition List of England & Wales as its Patron. Solicitors and barristers have a long history of volunteering their time to provide free legal advice and representation to individuals and charities who cannot otherwise pay for help. I am keen through this new initiative to recognise all those lawyers who give their time pro bono to help others and make a difference in their community.”*

In a statement of support for the Recognition List, **Nick Emmerson, President of the Law Society**, said: *“The Law Society supports the Pro Bono Recognition List and we urge all solicitors and barristers who have given 25 or more hours of legal pro bono support in the previous year to submit their name. It is a unique opportunity to recognise all those lawyers who give their time to provide legal assistance to those who cannot afford it. Pro bono work is just one way of bridging the gap between needs and legal representation by empowering individuals who would otherwise be left vulnerable and voiceless to access justice. Pro bono has a profound impact on the lives of countless people and communities. This initiative emphasises the commitment of the legal profession to the values of fairness and equality.”*

Bar Council Chair, Sam Townend KC also endorsed the Recognition List, saying: *“Almost half of all barristers had undertaken pro bono work in the last year, according to our 2023 survey of the Bar. This and other legal professionals’ often unacknowledged work should be celebrated. While no replacement for a fully funded legal aid system, pro bono work is a necessary part of our system and says something important about the legal community’s commitment to seeking to ensure access to legal advice and representation. Our thanks should be given to*

all of those who volunteer their professional time in this worthy endeavour.”

On behalf of the Attorney General’s Committee, **Chair of the Steering Group, Toby Brown** added: *“The initiative was developed with cross-sector collaboration, with the support of the professional bodies and the national pro bono organisations, reflecting a shared goal that lawyers from all sizes of organisation should be recognised for their pro bono commitment.”*

The list of organisations supporting the initiative includes the Access to Justice Foundation, Advocate, Advocates for International Development, the Law Officers, the Bar Council, the Clinical Legal Education Organisation, the In-House Pro Bono Group, the Law Society, LawWorks, the National Pro Bono Centre and TrustLaw.

Where lawyers have undertaken 25 hours or more, The Recognition List will recognise their pro bono legal work regardless of how it was undertaken, whether on an ad hoc basis or via a small or large pro bono scheme. Below are some case studies in which pro bono legal support has played a crucial role:

Case Study - Dignity and closure for bereaved families

Hudgell Solicitors recently represented the family of **Nicola Bulley** at the inquest into her death. Hudgells and **Sophie Cartwright KC**, of Deans Court Chambers, represented the family on a pro bono basis, with help from Advocate.

The firm’s priorities were to ensure the family was fully prepared for the inquest process and understood what it would involve, preserving the family’s dignity throughout the hearing. Given the family was vulnerable to the significant media interest and social media speculation, they secured closure for the family and an end to public speculation around the circumstances of Nicola’s death



The Lady Chief Justice of England and Wales, The Baroness Carr of Walton-on-the-Hill

The case was very high profile, given the huge media coverage of Nicola's disappearance in January 2023 and widespread speculation on social media platforms.

The senior coroner praised Hudgell solicitors and Deans Court Chambers for acting for the family on a pro bono basis because *"they believed this was the right thing to do"*.

Case Study - In-house expertise to level up learning resources

Social learning charity Speak Street offers free English classes to refugees, asylum seekers and migrants.

To support its community beyond the classroom, the charity wanted to publish a set of handbooks. However,

when staff realised some of the material belonged to third parties, they feared legal complications.

In house lawyers at Entain reviewed the handbooks, highlighting information belonging to the third parties, and then drafted appropriate copyright assignments. *"We hope the handbooks will continue to boost learners' confidence and extend the charities' outreach to the community of non-English speakers in the UK"* said **James Thomson**, senior legal counsel and co-chair of the pro bono network at Entain.

Case Study - Keeping the lights on at a local charity

In 2023, a Northumberland charity found itself in a dispute with an energy broker claiming a fee for an alleged breach of contract. As a small charity with a tight

budget, staff were faced with the impossible decision of paying the disputed amount or financing legal support – neither of which they could afford.

Local firm Muckle LLP stepped in after a referral from the local Community Foundation. The Newcastle-based firm is committed to providing exceptional social support to the communities where its staff live and work.

The firm robustly defended the unsubstantiated claim, which was dropped, so the charity can continue its mission in the community.

"Muckle's intervention came as a great relief" explained a charity spokesperson. *"It wasn't just what Muckle achieved for us, but the team's friendly, approachable, sympathetic and professional way they worked with us."*

Morecrofts jumps to increase support for inclusive netball club



Breaking new ground in community sports sponsorship, Morecrofts Solicitors has committed to inclusivity in sports by equipping a netball club with innovative new kits and equipment, introducing a game-changing option for players to choose shorts over the traditional netball dress.

The firm has supported the eponymous Morecrofts Netball Club for the past six years, helping it to evolve its membership to more than 60 players aged between 16 and 60. It now has seven teams taking part in both midweek leagues and Liverpool's Sunday Netball League. New players are welcome to attend training sessions at Archbishop Blanch School every Wednesday 7.30pm-9pm.

This latest investment has allowed the club to purchase new high-quality kits for all of its players and includes an option to wear branded club shorts and T-shirt as an alternative to the more traditional netball dress.



Morecrofts Netball Club captain **Rachael Lomax** said "In the past six years, we've seen our team grow and diversify, bringing the joy of netball to players of all abilities, ages, and backgrounds."

"The support from Morecrofts Solicitors has been critical to our sustained success, and we deeply appreciate their latest contribution to our playing kits. To our knowledge, we stand alone in the league in offering an alternative to the traditional netball dress, providing shorts and T-shirts for those who prefer them. This important step towards inclusivity ensures everyone can play in comfort, helping to eliminate barriers to participation in the sport we love."

Alison Lobb, managing partner at Morecrofts Solicitors, said: "We originally began supporting the club due to links between our staff and some of its players and the relationship has since gone from strength to strength."

"Netball plays a really important part in our communities, and we understand the health and social benefits it can offer to players. This latest idea to offer shorts instead of dresses will undoubtedly appeal to some potential players and we are fully supportive of any measures that help to increase participation and make sport more inclusive for all."

Three Developments...



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



Julie Johnson

As a city, how do you make the most of your most famous assets? No, I'm not talking about The Beatles. Well, not solely The Beatles. Instead, Liverpool's iconic waterfront.

Last Autumn, Liverpool BID Company announced the results of our Waterfront Positioning Paper, calling for stakeholders of the waterfront to have a say in how it is transformed for the future.

This Spring, we have had three major developments, each which show an element of how a famous site, one that is indelibly tied to a city's history, character and visitor economy, can be shaped.

Firstly, a new mural is being unveiled on the waterfront. Funded by Liverpool BID Company's Arts & Culture Fund, and curated and commissioned by ACC Liverpool and dot-art, the 18m mural depicts famous faces from Liverpool's cultural life. From music to theatre, sport and visual art, the faces include **Steven Gerrard, Jodie Comer, Sir Paul McCartney, Kim Cattrall** and more.

Created by artist **Joseph Venning**, the mural is next to the Pullman Hotel and Exhibition centre Liverpool. It is designed to inspire those 700,000

visitors a year who come to ACC Liverpool to see stars of music, comedy, theatre and sport, and to remind them that they come from a long line of cultural talent. If they can do it, so can you.

Public art and culture is a vital way of animating public space, but it is also an important way of reflecting our culture back to us. I know that each time I walk past this mural it will give me a little lift. It reflects our identity, our achievements and one of the ingredients that makes life in Liverpool so special.

The second development is the appointment of international experts, BDP, to support the city in developing a 25 year vision for the waterfront. As Liverpool BID stated in our positioning paper, those businesses, residents, investors and visitors who use the waterfront have such an important role to play in this process. We welcome their involvement and how they can add their voice. It gives such confidence and authority to a plan when people are able to have a say in their future.

The third is National Museums Liverpool's news that they have secured planning consent for a £15m project to transform Canning Dock into a place for *"education, contemplation and recreation"*.

Liverpool's docks play a vital part in our history. Understanding and contextualising that history within our present and future helps us to understand it. Canning Dock's history is rooted in Liverpool's deep involvement in transatlantic slavery. A modern and vibrant city is one that learns from its history and does not shy away from its implications but seeks to integrate historical significance into the modern day.

The past, present and future are all parts of our existence on Liverpool's iconic waterfront. Our role at Liverpool BID Company, knowing that the waterfront is part of our Culture & Commerce BID Area is to support their city in uniting those two aims, our culture and our business, tying the two together in a way that benefits all.



Photo by Rowanessque

Past Presidents Lunch, The Athenaeum, Friday 19th April 2024

Photography by Ray Farley



Twenty one Past Presidents of the Liverpool Law Society gathered for lunch at the Athenaeum on Friday 19th April 2024 with our guest of honour Gaynor Williams the current President.



The sun shone on this auspicious event with a much greater number attending than in previous years. Past Presidents had travelled far and wide to attend the lunch. Those attending this year were **John Ballam, Donal Bannon, Steve Cornforth, His Honour Tony Ensor, Nina Ferris, Alistair Fletcher, Edward Goldsmith, Andrew Holroyd CBE, Glenys Hunt, Norman Jones (chair), John Leith, Alison Lobb, Barrie Marsh, Timothy Marshall, Paul McCarthy, Richard McCullagh, Jeremy Myers, Julie O'Hare (secretary), Peter Rhodes, David Swaffield and Chris Topping.**

A number of Past Presidents were unable to attend due to distance including being in Australia at the time of the dinner.

PP Paul McCarthy said Grace.

An excellent lunch was provided by the catering team at the Athenaeum followed by the loyal toast and an extremely comprehensive report by our guest of honour on the state of health of the Society. **Gaynor's** financial analysis of the Society's finances was so detailed virtually none of the past presidents had a question to ask on this aspect of her report.



There was however much discussion over plans for celebrating the Society's Bi-Centenary celebrations in 2027 having been formed on 25th August 1827. Numerous suggestions were made for what should be a momentous year in



the Society's History including booking an outstanding speaker for the Society's annual dinner; Creating a bursary from which awards could be made for future generations to law students; Commencing fundraising for the year; ensuring that all organisations which have association with the Society are involved including the Universities, The Vauxhall Law Centre, the Courts, the Bar, the Chartered Institute of Legal Executives.

It was recommended to the President a sub committee be set up as soon as possible with regular reports to be produced. There was much support from the Past Presidents to supporting the year and to ensure the annual lunch is particularly special.



There were many anecdotes shared however one story shared by **PP Richard McCullagh** was worth repeating since the end of World War Two we have only had four employees of The Liverpool Law Society responsible for running the day to day affairs of the Society; **John Richards, Audrey Brown, Ronnie Wright** and our current CEO **Sarah Poblete.**

Norman Jones
Chairman of the lunch



Victory for Astraea Linskills at the 5RB Quiz



Astraea Linskills were honoured to be invited to the 16th annual 5RB quiz. The firm marked its first appearance by beating the other 24 teams in attendance (including those from London's top media law firms and media organisations like the Guardian and the BBC).

5RB are the leading barristers for Media and Communications Law, and regularly represent celebrities, royalty and politicians in Court.

The event helped raise funds for the Free Representation Unit and Advocate. It included rounds on music, sport and current affairs. The team was particularly pleased to unearth some quite

obscure answers on old legal dramas and music from Rocky IV.

Astraea Director **James Roochove** said "The 5RB quiz is a fixture in the media law world, featuring the crème de la crème of the London legal scene. For our new(ish) firm from Liverpool to get an invite was amazing. To win it was something else! Commiserations to the Guardian, who really did push us all the way.

We would like to give a huge thanks to 5RB, especially the wonderful **Georgina Gills** and her team in organising this brilliant event, Quizmaster extraordinaire **Adam Speker KC**, and **Ben Hamer** for being our allotted (and invaluable) 5RB star guest."



Annual Dinner featuring Legal Awards

The Legal Awards are back for 2024!

Open to members of Liverpool Law Society

CATEGORIES

Rising Star Award
sponsored by
The University of Law

Outstanding Team Award -
Dispute Resolution & Litigation

Outstanding Team Award
- Non-Contentious
sponsored by
Landmark

Outstanding Team Award -
Family Law
sponsored by
Document Direct

Equality, Diversity &
Inclusion Award
sponsored by
Liverpool John Moores University

Outstanding Lawyer Award
sponsored by
Miller Insurance

Law Firm Award
(1-49 employees)

Law Firm Award
(50+ employees)

Nominations will open on the Society's website 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 in
Liverpool, on Thursday, 14th November 2024.

SPONSORED BY



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

Homebaked Anfield - An Extra Serving



For over two years now we've been running our advice outreach project at Homebaked Anfield with support from Spirit of Shankly Liverpool Supporters Union.

Famous for their pies and community support, Homebaked has allowed us the space to see clients privately through an informal, drop-in-based system. Previously this service had run from 10 am until 12:30 pm, however, thanks to additional funding and support from Spirit of Shankly, we've now been able to expand this service to a whole day of support. The service now runs from 9:30 AM until 3 PM every Monday, helping clients with advice on their welfare and disability benefits - whether it's general enquiries, help with filling out forms for benefit payments like

Personal Independence Payments, or benefits checks.

We're extremely grateful to both Spirit of Shankly, and everyone at Homebaked Anfield for allowing us to grow this vital service provision, and we look forward to helping more clients in any way we can.

We Got A Car!



We've had some helpful guests in the building this last week. The good folks from RESOLVE Collective have built us some fantastic bookcases using recycled materials from the currently closed for refurbishment Tate Liverpool as part of their 'You Get A Car! [Everybody Gets a Car]' project. The project aims to redistribute and re-use materials to community groups and individuals, to try and create a lasting legacy of redistribution in the city.

The Bookcases will be the main element of our new informal Library, which we hope to launch soon as a space for our clients to wait comfortably for their appointments, as well as a site where people can access a small range of both fiction and non-fiction titles, for both adults and children.

It's been a pleasure hosting everyone



from Resolve, and we'd like to say a big thank you to them for involving us in this generous project. If you'd like to learn more the full exhibition is currently on display at Tate Liverpool + RIBA North - Mann Island until the 10th of July, featuring art pieces, a series of films, and information documenting both the project and the community organisations.

N & E Meet the GMB



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AVAILABLE FOR GMB MEMBERS AND THEIR FAMILIES

CLIENT TESTIMONIAL

"Claiming Universal Credit I've been so grateful of the help and support from yourself and the centre... I personally would have been at a point of despair and a worse state mentally and physically than I am already... Being in a trade union I was given the support of the Vauxhall Law Centre. Ngiganyan went through step by step each page explained things in understanding terms..."



In the last few weeks, both Development Officer Elly, and Senior



Solicitor and Centre Director Ngaryan visited the GMB Union's headquarters.

They spent their day meeting with GMB representatives from Local Government workplaces, talking about the history of the Law Centre, and informing them of the work that we provide for our clients, and how we may be able to assist them. We're thankful to both the GMB, and their members who

were able to attend, for both their time and the opportunity to talk with them.

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

Alternatively, we would be grateful if you would consider making a donation to support our organisation's work in providing access to justice to those who need it most. Further information can be found at vauxhalllawcentre.org.uk/support-us

OUR MARCH 24 IMPACT REPORT



TOTAL
NUMBER
OF
CASES
OPENED

=

76

TOTAL
NUMBER
OF
CASES
CLOSED

=

162

TOTAL
AMOUNT
SECURED
FOR
CLIENTS

=

£303,042.90

EDI Committee

In recognition of International Women's Day being in March, our guest speaker this month was female; District Judge Sheren Gurguis was kind enough to attend the meeting to speak on her experience on the process of becoming a Judge and her involvement in setting up a group to encourage diversity within the Judiciary

She was working as a Family Barrister for Exchange Chambers prior to obtaining her Judicial position. She explained that she had made several attempts to join the Judiciary; having made applications to be both a Judge and a Recorder. She conceded that the application can be very daunting, but reiterated throughout her talk that perseverance is key; shown in her admission that she made her first application back in 2015 and was not successful, but clearly was on her second attempt!

She advised as to what the process consists of; namely an exam, a selection day and an interview. The Interview format differs between a District and Deputy District Judge; the former was a mock trial type format of two situational problems, whereas the latter was direct questions. In her opinion the Interviewers really want to get the best out of you rather than scare you out of trying again if you do not quite manage it the first time. She also explained that you are given a Mentor Judge to support

you during the process, and to allow you an opportunity to sit in on hearings to provide an idea as to what the role entails. In her opinion the worst part of the process is the time between the application and the outcome; and the fact that you are not allowed to tell anyone about said outcome until it is published by the Judiciary. In her case, her interview was in October, she received her results in June, but was not formerly appointed until November.

In her opinion, the greatest barrier to becoming a Judge is the fear of failure, and her aim is to encourage people to see past that fear and embrace the opportunity. She confirmed that most people are not successful on their first attempt, so not to let it dishearten you if you are not successful the first time.

In respect of her background, she confirmed that she was fortunate that she never felt it had impeded her career progression, and in fact her experience has left her constantly surprised that people expected it to be any issue. She understands that at one time a female applicant may have had issue with endeavouring to become a Judge; however that has certainly not been her personal experience, and she would certainly encourage women in the legal profession who wish to consider a role in the Judiciary not to allow their gender to stop them!

With regards to the Diversity Group she has set up, this was created with the clear focus of endeavouring to encourage more diversity within the Judiciary. She explained that the whole idea of such groups is to show how anyone with the requisite qualifications and intelligence should feel able to apply. The Group is mainly members of the Bar, so they would also appreciate more Solicitors taking part. If anyone is interested, please let us know so your details can be passed on accordingly.

The group have been working with BME Committee in respect of encouraging young people into the legal profession; with several events set up in April with various schools, enabling students to come to court and see what's involved; including being involved in a mock trial. The intent is to encourage students to think about a possibility of a career in the legal profession. They are joining forces between schools, local firms and the Judiciary to hopefully increase aspirations of young people in the community.

If any firms wish to be involved in any further events arranged with schools (and the BME Committee) and are prepared to volunteer staff to attend such events, please let us know so your details can be passed on accordingly.

Amy Rachel Planche
Deputy Chair of the EDI Committee,
Solicitor at Carpenters Ltd

Slow Justice is no Justice

Jonathan Berkson, the LLS' chair of the Civil Litigation committee observes that "Slow justice is no justice" for many. Jonathan who is a recoveries solicitor at Bermans in Liverpool observes that delays by courts in handling cases often leads to debtors ceasing to have assets when cases eventually get concluded and an increase in the cost of litigation to conclude a case, which will generally be unrecoverable from unsuccessful litigants.

The Civil National Business Centre and On-line Court have reported an improvement in productivity for its 1 million claims it deals with each year. They report that they are to be working to a turnround rate of 10 working days.

LLS Civil Litigation committee observed that delays are not usual in Liverpool but have become commonplace elsewhere. In order to obtain some hard facts, the LLS

have set up an email address for its members to copy in civil court delay complaints to, so that the level and type of issues can be monitored. The email address is committees@liverpoollawsociety.org.uk

The issue of civil delay will remain on the LLS agenda and the complaints noted to allow for practical examples to be cited to enable the LLS to try and improve the situation.

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Join Us for an Unforgettable Golf Day!

Golf, often dubbed the “gentleman’s game,” transcends mere sport; it’s an arena where business meets pleasure, where networking takes on a whole new level of sophistication and where opportunities unfold with each swing of the club. We would like to invite you to be a part of our upcoming inaugural Golf Tournament: -

Date: Thursday 6th June 2024 (tee off from 12 noon)

Location: Caldy Golf Club, Links Hey Road, Caldy, Wirral, CH48 1NB

Tee Off for Success

Prepare yourself for an exceptional day of golfing excellence. Our Golf Tournament promises not only an opportunity to showcase your golfing prowess but also to forge valuable connections in a relaxed and convivial setting. The cost for a team of 4 is £600+vat and includes light refreshments on arrival, green fees and 2 course evening dinner. This event is open to all sectors and all abilities.

We are delighted to welcome Mark Evans, Deputy Vice President of The Law Society to join us for dinner and to talk to us about his current role.

Why Participate?

1. Networking Extravaganza: Rub shoulders with industry leaders, decision-makers and fellow professionals from diverse sectors. Whether you’re discussing the latest trends over a putt or sealing deals on the fairway, this event offers fabulous networking opportunities.

2. Strengthen Team Bonds: What better way to foster camaraderie among colleagues than a day spent navigating bunkers and conquering par-fives? Strengthen your team dynamics and boost morale as you strategize and celebrate together throughout the course.

3. Brand Exposure: Showcase your company’s commitment to excellence by sponsoring a hole or donating a raffle prize in support of our President’s chosen charity “Byrne Avenue Baths”. Capitalise on this prime opportunity to elevate your brand visibility and leave a lasting impression on potential clients and partners.

Sponsors Spotlight:

Our Corporate Golf Day wouldn’t be possible without the generous support of our esteemed sponsors. We extend our heartfelt gratitude to:

1. KE Costs: As our Headline Sponsor, KE Costs exemplifies unwavering dedication to fostering business growth and community engagement. Their contribution ensures the success of this event and we are immensely grateful for their support.

2. Our Hole Sponsors: Thank you to Quality PI and High Court Enforcement Group for their support sponsoring a hole. Hole Sponsorships are available at £250 +vat (contact sharon@jaidan.co.uk)

The Course:

Situated at the end of the Wirral Peninsula, alongside the River Dee, Caldy Golf Club boasts some of the finest views in golf. With its links style holes, affording views across the estuary to Wales, contrasting perfectly with its parkland and heathland style inland holes, the course provides the perfect challenge for golfers of all abilities.

Caldy are proud hosts of the 152nd Open Regional Qualifying on behalf of the R&A which takes place on Monday 24th June, so the course is guaranteed to be in tip top condition for our tournament!

Our Line Up so far:

Teams already signed up are: Bennett Williams Solicitors, Bermans, Donoghue Solicitors, In-House Legal Solutions, The Keith Jones Partnership, Oriel Chambers, KE Cost Lawyers and QPI Ltd

How to Get Involved:

For sponsorship opportunities or to register your team, please contact our event manager Sharon Stanton on sharon@jaidan.co.uk. Don’t miss out on this exciting new event in our events calendar —reserve your spot today and get ready to swing into success at our inaugural Golf Day! Register online and reserve your team www.liverpoollawsociety.org.uk/events



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LIVERPOOL LAW SOCIETY

GOLF

TOURNAMENT

2024

This event promises to be a fantastic opportunity to combine business with leisure while enjoying the beautiful surroundings of Caldy Golf Club. The tournament is open to golfers of all abilities across all business sector organisations.

Tee off times will be staggered from 12pm onwards, followed by dinner in the club house and winners presentation.

Thursday
6th June
 2024

ENTRY FEE

£600 +VAT per team of 4.
 Includes light refreshments on arrival, green fees and evening dinner.

REGISTER ONLINE

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RIP Michael Cohen



Chris Makin

I recently attended the funeral of a man you have probably never heard of, but who was of enormous importance to all you litigators, whether civil & commercial, family, criminal or ADR.

After several years as a boring old chartered accountant – annual accounts, audits, tax returns, business plans... - I was asked to act as an expert in several cases, including one concerning a stuntman on a Superman film who was injured at Elstree Studios, which required me to spend a week at the RCJ and a day in the witness box. I was hooked. Then I was asked to act in an international fraud case against the SFO, where my report for the defence ran to 43 ringbinders and I was told I would be at the Old Bailey (actually an annex in Chancery Lane called Chichester Rents) for a trial lasting 18 months. But my report was agreed by the prosecution, and I didn't need to appear. I had had to give all my clients to other partners, so I had literally nothing to do. I wrote my first mailshot letter on the train back from London ("I'm a forensic accountant – gizza job"), the work flooded in, and many years later it has never stopped.

I realised this was getting serious, and that I needed to learn how to be a proper expert. This is when I came across The Academy of Experts. It was founded by Michael Cohen in 1987, at a time of great transition in litigation. Many of you will not remember the bad old days, but I certainly do. Lord Woolf, Master of the Rolls, was concerned about inefficient courts, cases which lasted almost as long as *Jarndyce -v- Jarndyce*, excessive legal costs, solicitors "churning" cases, and much else. He published *Access to Justice* which became the basis of the Civil Procedure Rules, soon followed by the Family Procedure Rules and the Criminal Procedure Rules, all on similar lines where judges controlled cases.

This was the late 1980s; the CPR was launched on 1 April 1999.

There was also much wrong with the expert witness "profession". It is a profession now, but it wasn't in the bad old '80s. The hired gun was commonplace, and so many experts thought it was their duty to win, or to save, their client as much as possible. I remember an orthopaedic surgeon who lectured with a skeleton which he danced, and he said he didn't believe that whiplash existed. He was very popular with his motor insurance clients.

This of course was quite wrong; those who instruct us are not our clients, since our overriding duty is to the court, irrespective of who instructs us or by whom we are to be paid.

This is where Michael Cohen came in. He was a barrister, and an expert in insurance. He saw the need for experts to

be educated in such matters, so he founded The Academy of Experts in 1987, in good time for his concepts to be reflected in the CPR and all that followed.

I was not a founder member; I joined in 1990 but my membership number (531) shows that I joined when it was a very small organisation. Since then it has flourished, with about 4,000 members of virtually every profession in the UK, and with pockets of members in other jurisdictions.

The Academy is respected by other professional bodies; for example it has close working relationships with ICAEW (my profession) and RICS, to name but two. It has a judicial committee of seven senior judges, and has published a Model Expert Report, Model Terms of Appointment of Experts, Guidance for Those Who Instruct Experts and, more recently, guidance on remote and virtual hearings.

There is a regular Journal the TEDR (The Expert and Dispute Resolver) of which Michael was until recently the editor.

As a measure of how highly regarded The Academy is regarded in legal circles, one need only look at the calibre of those who have served as our president: **Sir Geoffrey Howe QC** (Margaret

Chris Makin

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- Section 994 Disputes
- Director Disqualification
- Expert Determinations



N Christopher Makin FCA FCMI FAE QDR MCIArb

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Thatcher's chancellor); **Lord Savile** (of the Bloody Sunday enquiry) and now **Lord Neuburger**.

The Academy is a centre of excellence for experts, and much of that is the result of Michael Cohen's dedication to the cause. He has been a tireless, and very competent, lecturer on all things litigation and expert. I had the great honour to be admitted as a fellow in 1994, one of only about 60 worldwide. Michael devised training courses and an accreditation scheme for mediators, and I was accredited as such in 1998. He developed a training course and accreditation scheme for expert determiners (a form of arbitration) and I am proud to say that I was in the first ever batch of EDs to be accredited in 2009; I am now the chief examiner in ED.

So, thanks to Michael, we now have an Academy of members offering a wide range of dispute resolution methods, both conventional litigation and ADR.

This man never stopped. For many years he had done lecture tours around the world, and only a few months ago he had lectured in Dubai, Singapore, Hong Kong and Australia. So he was still full steam ahead until just a few weeks before he died – and only a few weeks before his ninetieth birthday!

Sleep well, Michael; you deserve your rest. And we members of the litigation community (even those of us who have never heard of you!) are so very grateful for all you have done for us.

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:

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Regulation Update - May 2024

The latest Regulation news from Andrea Cohen of Weightmans LLP



Andrea Cohen

Other than SRA and SDT disciplinary and regulatory decisions, it's been a fairly quiet month in the world of risk and

compliance, but that could, of course, just be the calm before the storm.

AML – SRA guidance on firm inspections

On 16 April 2024 the SRA confirmed that it is starting its new round of AML inspections in May and published its updated guidance on what to expect on an inspection: <https://www.sra.org.uk/solicitors/resources/money-laundering/guidance-support/firm-inspections/> with two key changes: the SRA will be looking more closely at AML controls and may not always interview fee earners. Prior to the review you will be asked to send documents within 14 days of the request, including:

- your firm's AML risk assessment (FWRA)
- risk assessment in relation to proliferation financing, which may be a separate document or included within the FWRA
- AML policies and procedures (PCPs)
- ongoing monitoring and management of compliance with PCPs, e.g. random file audits, checklists.
- client AML risk assessment template
- Independent AML audits, including any recommendations or follow-up action arising from them
- AML-related training records

If you have any concerns, require an independent AML audit or general advice, please get in touch with the Compli team if we can be of assistance.

AML – HM Treasury consultation

HM Treasury is consulting on changes to the MLRs as part of a wider programme aimed at reducing money laundering. There are four main themes of focus: making customer due diligence more proportionate and effective; strengthening

system coordination; providing clarity on the scope of the MLRs, and reforming registration requirements for the Trust Registration Service. The consultation closes on Sunday 9 June 2024.

SQE “working well” - or is it?

Having reported on 10 April that latest reports have shown SQE ‘continues to perform well and there can be confidence in this rigorous assessment’, on 15 April the SQE assessment provider Kaplan apologised for a marking error which meant that 175 of the 6,262 candidates who sat SQE1 in January were wrongly told they failed one of the two assessments, both of which need to be passed. The error was only spotted when candidates appealed the results, but by then, apparently, a number of people have had their training contract rescinded or lost their jobs.

New practice notes and guidance

Rather unusually, other than the guidance referred to above, there have been no new practice notes and guidance published by the Law Society or the SRA since our update last month. We understand that the SRA are redrafting the Sanctions Guidance, so watch this space!

Disciplinary and regulatory decisions:

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

Solicitor who falsely represented client struck off by SDT

A solicitor has been struck off after the SDT found that he had falsely represented to a client and/or the Court that the firm was representing the client when it was not. He was also ordered to pay costs of £20,000.

Solicitor struck off over ‘misleading’ time records

A solicitor who created time records which were ‘inaccurate’ and ‘misleading’ has been struck off. The SDT found that by creating time records in excess of the time worked, the solicitor’s conduct was dishonest and misleading.

Ordering the strike-off, the tribunal added: ‘All solicitors, irrespective of their experience, knew that it was improper to record time for work that had not been performed.’

Solicitor struck off for ‘inappropriate and offensive’ tweets

For the third month in a row, a decision has been reported of a solicitor who has fallen foul of the rules in connection with social media use. He was struck off in relation to tweets which were posted on his public profile and deemed to be antisemitic. It was found that these tweets breached SRA Principles 2, 5 and 6.

Firms fined for failure to maintain relevant documentation

One firm has been fined over £17,000 and another just under £10,000 for failing to have in place or to maintain relevant documentation to prevent activities relating to money laundering and terrorist financing as required by the MLR 2017.

Another firm has been fined over £20,000 for AML failures, including failure to have in place adequate policies, controls, and procedures.

Solicitor fined for own interest conflict

Following a finding by the Tribunal that a solicitor had entered into financial arrangements or given loans to clients where there was an own-interest conflict or significant risk of one, he has been fined £30,000 and ordered to pay £20,000 costs.

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.

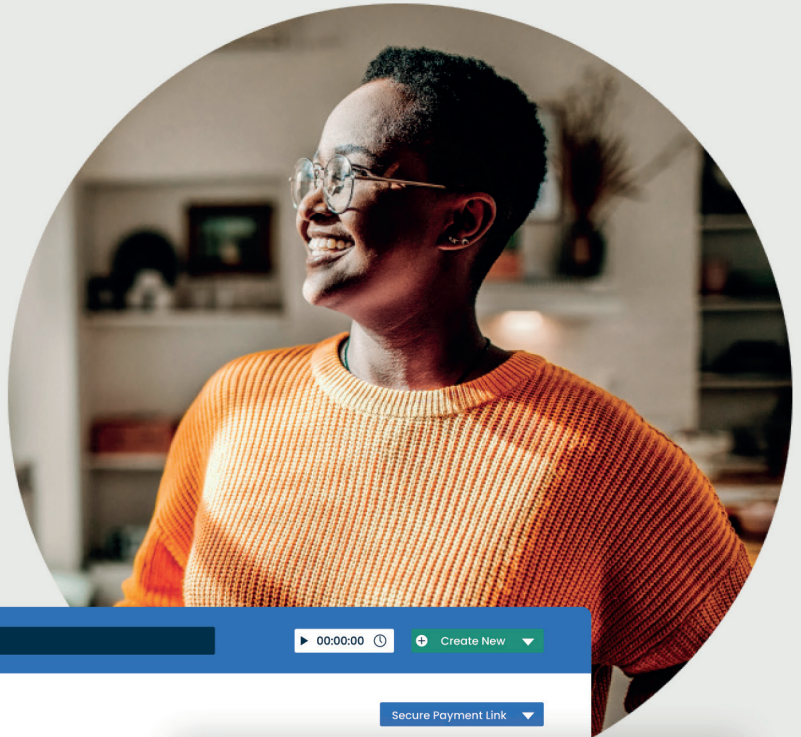
Andrea Cohen
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The screenshot displays the Clio web application. The top navigation bar is blue with the Clio logo, a search bar, a timer showing '00:00:00', and a 'Create New' button. A sidebar on the left contains icons for various functions. The main content area shows a 'Transactions' table with columns for 'Authorized', 'Completed', 'Failed', and 'All'. Below these are columns for 'Actions', 'Status', 'Client', and 'Description'. A 'Secure Payment Link' button is visible. Overlaid on the right is a white modal titled 'Payment Received!' with a 'See all payments' button and input fields for 'Amount', 'Description', 'Account type', 'Name', and 'Email'.

Authorized	Completed	Failed	All
Actions	Status	Client	Description

Payment Received!

[See all payments](#)

Amount:

Description:

Account type:

Name:

Email:



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Charity Spotlight: mind Wirral



Who are we?

Wirral Mind is a local, independent mental health charity, established in 1967 to help people in our community achieve better mental health.

Our vision

We won't give up until everyone experiencing a mental health problem gets both support and respect.

Our mission

Our aim is to normalise conversations around mental health, tackle stigma and discrimination, raise awareness, promote understanding, and support our community to live mentally healthier lives.

.....
"If it wasn't for Mind I wouldn't be here now...
...I will never forget their part in my recovery."

Our Services

We provide a range of services to support our community.

- Mental Health Resource Centre
- Support groups and activities
- Counselling
- Befriending
- Motiv8! (Physical Activity Project)
- Mums Matter
- Supported Living Service
- Lived Experience Networks
- Third Sector Community Connector
- Workplace Wellbeing Training
- Suicide Prevention Training
- Volunteer Opportunities

Who can access our services?

Our services are open to adults aged 18+ in the Merseyside area.

Contact Us

Call us on 0151 512 2200
or email:

learning@wirralmind.org.uk

Workplace Wellbeing Training

Whether you're an employee worried about your own, a colleague's mental health or you are a HR professional who wants to improve mental wellbeing in your organisation. We're here to help.

We all have mental health, just as we have physical health, and in both cases, we are on a continuum, where our health can vary day to day.

Businesses rely on having a healthy and productive workforce. It is estimated that 1 in 4 people experience a mental health problem in any given year, and that 1 in 6 employees experience depression, anxiety or are suffering from stress-related problems at any one time.

"1 in 4 people will experience a mental health problem each year"

The good news is that enlightened organisational practices and well-trained line managers play a powerful role in fostering wellbeing and sustaining good mental health.

Wirral Mind offers a cost-effective way to promote mental wellbeing in your organisation. We provide a number of mental health training courses that can help employers and their employees improve their understanding of mental health and of how they can support others.

Our training includes:

- Mental Health Awareness
- Adult Mental Health First Aid
- Line Manager Training
- Suicide Prevention Training

Our training team will work closely with you to deliver bespoke training, ensuring your specific organisational needs are met to the highest of standards.

"Prioritising mental health has never been more important"



Contact Us

Call us on 0151 512 2200 or email learning@wirral-mind.org.uk For more information about any of her services, visit www.wirralmind.org.uk or scan the QR code



Four ways technology is changing the face of private client practice



Craig Matthews

While traditionally perceived by many as slow and antiquated, private client practice is, in reality, an area of law that is required to move quickly, with an increasing number of practitioners being asked to serve a broadening section of society and their evolving needs. Society and the world we live in are changing at a rapid pace, and so must the technology practitioners use and the service they deliver, in order to stay relevant.

Legal Technology is revolutionising the delivery of estate planning, probate, lifetime planning and will preparation services by:

Centralising digital matter files in the cloud

Providing a single, secure, and searchable electronic matter is central to streamlining private client practice. It offers one fully searchable digital file containing all data, documents, and emails related to that matter, easily accessible within the cloud. Granting practitioners the ability to access up-to-date matter information and documentation from any location streamlines client service, enhances collaboration, and minimises duplication of work, errors, or inaccuracies.

An additional benefit of having a single digital matter file with up-to-date client and matter information is the ability to generate and complete documents with ease, by merging the captured details into letter templates and court and government forms quickly and consistently.

Automating complex tasks

Leading legal software providers are offering intuitive technology that simplifies the day-to-day life of a private client practitioner. They are developing innovative productivity tools to complete time-consuming tasks, such as estate account and inheritance tax automation. Technology streamlines the collection of estate data and the generation of IHT forms, applying up-to-date legal rates and calculations

in line with updates to legislation and cost changes.

Enabling wills and LPAs to be drafted in minutes

Critical to the profession in terms of technology is highly automated specialist will writing software. Such software includes up-to-date clauses maintained by experts, enabling practitioners to create both simple and complex wills, as well as lasting powers of attorney, with ease. The fast and accurate production of wills and LPAs is pivotal to a successful private client practice, improving client service and saving valuable practitioner time.

Allowing powerful system integrations

We all know that practice management software is pivotal to the success of a private client practice, but how the software integrates with other technology to add value to private client practitioners is something to consider. Tools to further streamline processes might include verification of identity and funds, document collaboration, time recording, online payment and eSignatures.

As practitioners face growing and diverse clientele with ever-changing needs, adaptation is crucial. This dynamic shifts in society necessitates innovative technology in order to remain relevant, revolutionising estate planning, probate, lifetime planning, and will preparation services.

Craig Matthews,
CEO of LEAP Estates



About LEAP Estates

LEAP Estates occupies a unique position in the legal software market, providing specialist software for probate solicitors and estate planners.

With powerful features and functionality, the innovative solution provides everything you need to manage your client's wills, LPAs and estates efficiently, including case management, accounting, document assembly and management, will building and legal publishing assets in one integrated cloud solution.

For more information, please visit www.leapestates.co.uk or follow [LEAP Estates on LinkedIn](#).

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Rebecca Roscoe



Rebecca Roscoe

Liverpool Law Society was delighted when Rebecca Roscoe agreed to provide the 2-day Intro & refresher to Probate & Estate Administration training last May and invited her back earlier this year.

Some feedback from delegates was:

"Really enjoyed this and got a lot from it- loved that case studies were used as it felt more engaging, was great to have use of the chat function to ask questions"

"Big thank you to Rebecca for an excellent course. The course resources are very helpful and it was pitched at just the right level for me"

Rebecca trained and qualified as a solicitor in 2003 and completed her STEP diploma in 2008. After 11 years in practice culminating in partnership at Cottrills then Slater Heelis LLP, Rebecca founded her own practice RJR Legal Ltd - a niche practice specialising in Wills and Estate Planning with a particular focus on long term family estate planning.

Rebecca has now kindly agreed to provide some further training:

- **A Tricky Business: BPR and APR Explained**
Providing a comprehensive understanding of Business Property Relief (BPR) and Agricultural Property Relief (APR), two key components of inheritance tax planning in the United Kingdom. Delegates will explore the criteria, application process, and planning strategies associated with these reliefs to effectively minimize inheritance tax liabilities. Using practical case studies, the course will explore how to apply the reliefs in practice.
- **IHT400: A Practical Guide**
Tackling the difficult issue of inheritance tax and will be of

interest to probate practitioners who are required to complete the IHT 400. It will provide delegates with an in depth analysis of the pitfalls and problems to be aware of when completing IHT400 and, through the use of sample scenarios, will offer comprehensive guidance on how to complete the IHT400 successfully. Rebecca will also provide practitioners with top tips and supporting documentation which you can use in practice.

- **Tax Doesn't Have to be Taxing: A Masterclass**

For private client practitioners understanding personal taxation is fundamental to both lifetime planning as well as dealing with trust and estate administration. This course will guide you through income tax, capital gains as well as inheritance tax to give you a comprehensive overview of this complex subject. Using practice scenarios and calculations this course will give you confidence when approaching personal taxation as well as during the administration of an estate or trust.

For full details & to book, see: [Wills, Trust, Tax & Probate Archives | Liverpool Law Society](#)



Personal Branding for Associates/Partners

with Jannette Brimm

Live online, Friday 21st June, 12pm - 1pm

Personal Branding is not only relevant for individuals but is also a powerful tool for developing and growing a business.

Join Personal Branding Consultant, Jannette Brimm, who will share know-hows as to why having, building & incorporating your personal brand into your business development is a powerful business development strategy.

A preview of some of the many benefits:

- Personal Branding encourages connection with your target clients on a more personal level which increases trust.
- Personal Branding nurtures loyalty among clients who resonate with you the person behind the brand.
- Personal Branding within your practice area communicates your specialism, skills, expertise and authenticity.

& more...

For more information or to book, [click here](#)


Forthcoming Courses

DATE	TOPIC	SPEAKER
08/05/2024	Loan Agreements: Law & Practice	Alan Wilkinson
09/05/2024	Personal Injury Update	Andrew McLoughlin
10/05/2024	Personal Branding for NQs	Jannette Brimm
13/05/2024	Introduction to Wills and Probate, and Connection with Family Law	Safda Mahmood
15/05/2024	Private Client Conference 2024	Various
17/05/2024	AML for Support Staff	Matthew Hickling
22/05/2024	Managing & Mitigating Directors' Conflicts under the Companies Act	David Impey
23/05/2024	Private Child Law Update	Safda Mahmood
23/05/2024	Public Child Law Update	Safda Mahmood
05/06/2024	A Tricky Business: BPR and APR Explained	Rebecca Roscoe
07/06/2024	Insolvency for Family Lawyers	Chris Beanland
07 & 14/06/2024	The Complete Legal Aid Supervisor	Vicky Ling
10/06/2024	Taking Security, A Practical Guide	Alan Wilkinson
11/06/2024	New Residential Enquiries	Richard Snape
12/06/2024	Civil Litigation Update	Andrew McLoughlin
17 & 18/06/2024	Children Law Accreditation (former CPQ) 3-Day	Safda Mahmood
19/06/2024	Introduction to the new ICO GDPR Certification for the Legal Sector,	Orlagh Kelly
19/06/2024	Reporting to the Lender and Hot Mortgage Issues	Richard Snape
21/06/2024	Personal Branding for Associates/Partners	Jannette Brimm
25/06/2024	Alternative financing: crowdfunding platforms	Alan Wilkinson
26/06/2024	IHT400: A Practical Guide	Rebecca Roscoe
26/06/2024	International Children Law Update	Various
02/07/2024	Solicitors Regulatory Update	Matthew Hickling
03/07/2024	Tax Doesn't Have to be Taxing: A Masterclass	Rebecca Roscoe

To comply with the SRA's [Code of Conduct for Solicitors, RELs and RFLs](#), ALL solicitors must keep their professional knowledge & skills up to date. These courses will help you maintain an up-to-date understanding of relevant law, policy & practice

.** Training events open to legal professionals nationwide **

For full details or to book any of the above courses (& more!) please visit: www.liverpoollawsociety.org.uk


2024 Private Client Conference
 Wednesday 15th May | 9.30am - 3.30pm
Hybrid - attend in person or online

This conference is packed with insight and discussion covering the latest technical developments & best practice

Sessions include:

Representing those who lack capacity – understanding the MCA and regulatory requirements
 Peter Edwards, Peter Edwards Law


The Court of Protection and property and finances litigation
 Sophie Hurst, Kings Chambers


Capital Planning Update
 Emma Chamberlain, Pump Court Tax Chambers

IHT/CGT anticipating changes post election - what clients should do now?
 Michael Sherry, Complete Counsel

Wills Reform Update
 Ian Bond, Irwin Mitchell

LPA Update
 Louise Scholes, Brabners

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[Book Here](#)



AML for Support Staff
 with Matthew Hickling
 Live online: 17th May, 11am - 12.30pm

With expanding sanctions and a public focus on lawyers as ‘professionally enabling’ the laundering of criminal proceeds, there has never been a more important time for law firms to be able to demonstrate compliance with their training requirements.

This online seminar is geared to the realities of legal practice. With emphasis on the everyday problems and issues for legal practitioners and their clients, it will include:

- Regulatory Update – What’s hot with the SRA and other regulators
- Legal Update – The Economic Crime and Corporate Transparency Act 2023
- Risks and vulnerabilities – What’s current in fraud cybercrime
- Case Study – Can you see the risks, the threats, and the red flags?

[CLICK HERE TO BOOK](#)



Managing & Mitigating Directors’ Conflicts under the Companies Act
 with David Impey
 Live online: Wednesday 22nd May, 10am - 11.30am

This online course will help commercial lawyers in private practice and in-house, and company directors & secretaries cover all the bases, including for companies in a group, and take the practical steps needed to keep conflicted directors within the law.

Covering;

- Terminology
 - ⇒ Situational’ and ‘transactional’ conflicts
- Situational conflicts (s 175)
 - ⇒ The elements of the duty
 - ⇒ Remedies for breach
 - ⇒ Examples of ‘situations’
 - ⇒ Exceptions
 - ⇒ Who is caught?
- Authorisation of situational conflicts by members
- ‘Conduct’ provisions in articles/resolutions
& more....


For more information or to book, [click here](#)


Private Child Law Update
 with Safda Mahmood
 Live online: Thursday 23rd May, 10am - 12.30pm

This online course will equip you with a rounded up update on key issues surrounding private children law, with a particular focus on changes and updates in the area.

The areas to be covered are:

- Parental Responsibility
- Section 8 orders – Update
- Specific Issue Applications
- Contact (Child Arrangements) and Enforcement – Update
- Child Arrangements Orders
- Domestic Abuse and Child Arrangements
- Leave to Remove Applications
- Special Guardianship Orders
- Key Case law Update



[CLICK HERE FOR MORE INFO](#)

Public Child Law Update

with Safda Mahmood

Live online: Thursday 23rd May, 1pm - 4pm

This online course will equip you with a rounded up update on key issues surrounding public children law, with a particular focus on changes and updates in the area.

It will be of benefit to those acting for parents, children, extended family & local authorities.



The areas to be covered are:

- Separation under Interim Care
- Contact and Children
- Assessments and Timescales
- Public law Outline, Best Practice and Timetables
- DOLS Applications and Secure Accommodation
- Placement Applications and Adoption
- Special Guardianship and Practice
- Key Case Law Update
- Updates on Statutes and Practice Directions

Can't make the date/time or need to revisit the training? No problem, booking onto online event means you will receive a link to access a recording at your leisure!

[CLICK HERE FOR MORE INFO](#)

A Tricky Business: BPR & APR Explained

with Rebecca Roscoe

Thursday online: 6th June, 9.30am - 12.45pm

This online course provides a comprehensive understanding of Business Property Relief (BPR) and Agricultural Property Relief (APR), two key components of inheritance tax planning in the United Kingdom.

Delegates will explore the criteria, application process, and planning strategies associated with these reliefs to effectively minimize inheritance tax liabilities. Using practical case studies, the course will explore how to apply the reliefs in practice.



Can't make the date/time or need to revisit the training? No problem, booking onto online events means you will receive a link to access a recording at your leisure!

[BOOK HERE](#)

NEW Insolvency for Family Lawyers

with Chris Beanland

Live online: Friday 7th June, 10am - 12pm

Anyone who practices in the area of family law needs to be aware of the interaction between family law and insolvency law. There are many traps for the unwary.

This online course deals with insolvency issues that all family lawyers should be aware of in their day to day practice.

The course covers:

- Use of a bankruptcy petition as part of a 'scorched earth' policy
- Making an application to annul an abusive petition
- Matrimonial settlements and 284 Insolvency Act 1986
- Bankruptcy and the family home
- Pensions on insolvency
- Income payments orders
- Do claims under the MCA 1973 vest in a trustee?
- Challenging matrimonial settlements as transactions at an undervalue or preference

Can't make the date/time or need to revisit the training? No problem, booking onto this event means you will receive a link to access a recording of the event at your leisure!

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- Also a useful refresher for experienced supervisors

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ONLINE
7th & 14th
JUNE

SUPERVISORS ARE THE KEY TO A SUCCESSFUL CONTRACTING RELATIONSHIP WITH THE LEGAL AID AGENCY

www.liverpoollawsociety.org.uk



***NEW* Taking Security: A Practical Guide** with Alan Wilkinson

Live online: Monday 10th June, 12pm - 2pm

This online session is designed to enhance the understanding of the commercial rationale for lenders taking security and the different methods of taking security over assets as well as the specific concerns in relation to certain asset clauses.

It will also analyse security agreements generally and outline the structure and principle terms of a debenture together with areas for negotiation.

This online course covers;

- Types of security
- Taking security
- Taking security over specific assets
- Capacity and authority
- Borrower's perspective—granting security
- Lender's perspective—issues with taking security
- Negotiating security documents
- Perfection and priority of security
- Syndicated security documents
- Amending and transferring security
- Enforcing Security

FOR MORE INFORMATION OR TO BOOK, CLICK HERE



Civil Litigation Update with Andrew McLoughlin

Live online: Wednesday 12th June, 1.30pm - 4.30pm

Where to begin! A course you cannot afford to miss.

The landscape continues to change at some pace following the introduction of FRC to procedure & practice.

This online course will cover the following topics:

- Relief from Sanctions—is it getting any better 10 years on
- Part 36 – developments in the last 12 months
- Procedure in Practice—case law for the last 12 months
- All the procedural changes in the last 12 months
- Mandated ADR
- Costs update/budgeting/assessments
- Civil procedure- NEW- a topic covering what it says including April's Rule changes

Can't make the date/time or need to revisit the training? No problem, booking onto this event means you will receive a link to access a recording of the event at your leisure!

BOOK HERE



3 Day Children Law Accredited Course with Safda Mahmood

Day 1– 7th June/Day 2–18th June/Day 3–28th June,
all 10am - 4pm

The 3-day online course is designed to enhance your legal knowledge, as well as to ensure that you are familiar with the requirements for membership. It will provide you with tips for good practice, as well as undertaking case studies in groups, so as to apply your knowledge to various scenarios.

- Private Children law and Procedure
- Local authority procedures and duties
- Contact and assessments
- Threshold and use of experts
- Human rights issues
- Taking instructions from children and separate representation
- Care planning and Public Law Outline
- Evidence, procedure, advocacy and preparation
- Adoption, Placement Orders and Attachment
- Secure Accommodation
- Complaints procedures and Criminal Injuries Compensation

THIS EVENT WILL NOT BE RECORDED

BOOK HERE



Reporting to the Lender & Hot Mortgage Issues with Richard Snape

Live online: Wednesday 19th June, 1.30pm - 4.30pm

Reporting to the mortgage company is a perennial problem for the conveyancer. This online course selects some issues and discusses solutions. In particular the Building Safety Act 2022 is causing major problems.

Topics covered include:

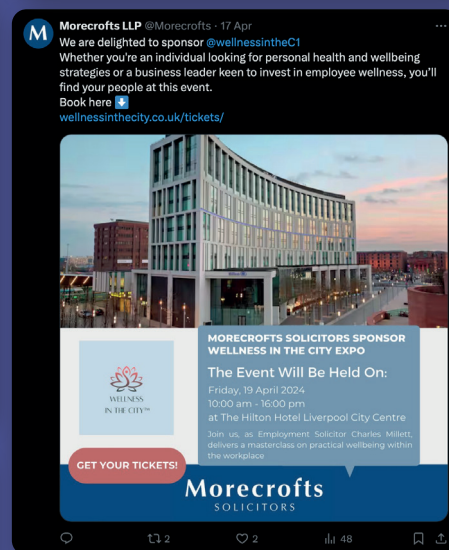
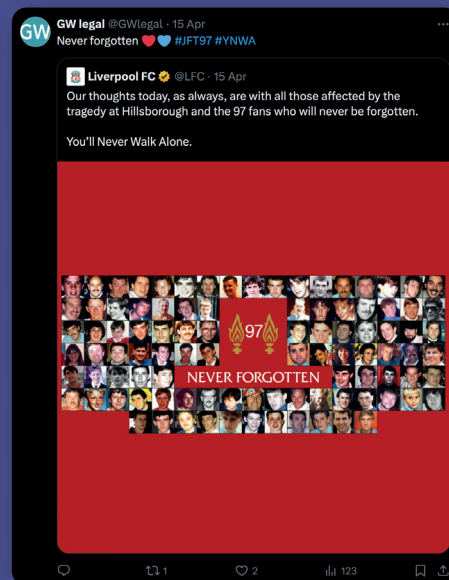
- Conflicts of interest and valuation issues
- Leasehold issues and lender requirements
- Some specific areas:
 - * Japanese knotweed
 - * solar panels,
 - * planning issues, and
 - * flying freeholds
- Building Safety Act 2022 and Lender Requirements
- Estate Rentcharges
- Planning Permission and Lender Requirements



CLICK HERE TO BOOK

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.



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



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X-Press Legal Services provides professional property searches and reports to the conveyancing sector through our network of offices across England and Wales.

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