

July 2024

Liverpool Law

Liverpool  Law Society

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

LLS hosts 'Leaders in Law Dinner' at the Bluecoat Arts Centre

Report on page 24





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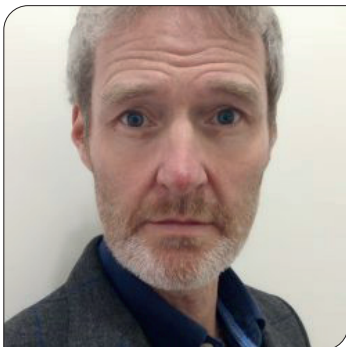


The Law
Society

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July 2024

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DEADLINES

Tues, 23.07.24

Tues, 27.08.24

Tues, 24.09.24

Tues, 22.10.24

Tues, 26.11.24



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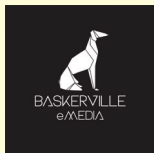
Liverpool Law Society Magazine is produced by and for Liverpool Law Society Members. This is our opportunity to share our news, events and celebrations with our friends in the legal community.

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.

17.07.24
17.09.24
15.10.24
19.11.24

Welcome to the July edition of Liverpool Law



We have another jam-packed edition for you this month with lots of social activities it seems- we have features on the Leaders in the Law Dinner, LLS golf event, Hilbre walk and the increasingly popular LLS social. It is nice to see more and more members attending these. We also have details of upcoming social activities including the MJLD Ball, Legal walk and LLS Annual Dinner so please do sign up. Socials aside we have plenty of opportunities for you to attend a training course or conference, committee meetings and joint forum. There are plans in the pipeline for the EDI Judiciary meeting and other events.

We have our spotlight on new Director **Anthony Neild**, our Leaders in Law interview with **Ian Cohen** and more movers and shakers pages than I think we may have ever had! Please keep them all coming in and keep sharing your news and knowledge with us. We have had some submissions for the social media highlights page of late, which is great, but we can offer more than that and give the full recognition your legal and charitable work deserves. If you do not have the resources to send over full articles please let us know and we will support you with this where we can.

As always this is your local law society and your magazine so any ideas please send them over.

Many thanks,

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

Welcome to new members

We would like to give a warm welcome to our new members who were approved for membership at June's General Committee meeting.

There were 2 individuals from the following organisation:

- In-House Legal Solutions

Liverpool Law Society's membership now exceeds 2,430 individuals from 190 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

I hope some of you enjoyed 'Taylor Town' in June and I expect a few of you 'swifties' out there had an opportunity to see Taylor Swift in concert when she visited Liverpool.

The weather, as I write this column, has been cold and wet, however we were very fortunate to have a rain free day on 2 June 2024 when we went on our Joint Walk with Cheshire & North Wales Law Society to Hilbre Island. There was a good attendance from both Law Societies, and there was the additional bonus of an open day. **Jeremy Myers**, Past President, has prepared an article about the walk, in this edition. Thank you to **Nicola Walker** for organising the walk, it was a very enjoyable day.

Sarah Poblete, CEO of LLS, and I, attended Cyber Essentials Roadshow at Merseyside Police Headquarters the following day, 3rd June 2024. Cybercrime is a serious issue, and it is on the increase throughout UK with Law firms also being targeted. I would urge all practitioners to update and change their passwords regularly and make sure that they are not the standard ones that are commonly used such as 'Password'. The Cyber Resilience Centre for the North West has lots of information and guidance on its website and membership is free, so it is well worth visiting their website and considering joining: - <https://www.nwcrcc.co.uk/merseyside>.

On 6 June 2024 we held LLS's inaugural Charity Golf Tournament, there is an article about it in this edition, and I am pleased to say that it was a very successful and rain free day! Well done to the winners, The Keith Jones Partnership, I hope the trophy has prime place in your trophy cabinet.

The following day I was in Birmingham to attend Birmingham Law Society's President's Dinner. The venue was the Great Hall in the University Campus in Edgbaston and it was a magnificent place to hold an event, in a grade 2 listed building dating back to 1900. The speeches from the President **Alice Kinder** and the guest speaker **Jess Phillips MP**, were from the heart and touched upon access to justice and social mobility. It was a very enjoyable evening, and the 360-photo booth was a hit with everyone.

Thank you to Chair of the Civil Litigation Sub Committee and fellow Director **Jonathan Berkson** for inviting me to the Liverpool Law Golf Society Dinner on 10 June 2024. This was held at the Royal Liverpool Golf Club in Hoylake, where the likes of **Tiger Woods** and **Rory McIlroy** have played. It was a pleasure to see everyone and meet new friends from Dublin, Belfast, and Lyons. Well done to Dublin for winning the trophy.

On 13 June 2024 the committee members, Directors and Officers met for a chance to 'let their hair down' at the committee social at Atrium in Tithebarn Street, Liverpool. It is always an informal friendly event, and it is becoming more popular each time we hold it. I especially like to see new Directors, trainees, and newly



qualified lawyers at these events, because they are the ones that will be taking LLS forward in the future.

We had our Leaders in Law Dinner on 19 June 2024 at the Bluecoat, Liverpool city centre. The setting is beautiful, and it was an enjoyable evening, an opportunity for everyone to meet old and new friends and enjoy dinner together. **Sarah Mansfield**, Deputy Vice President, has prepared an article about the evening, in this edition.

On 18 July 2024 we have the Directors meeting with Liverpool City Region Councillors. If anyone has any items that they wish to be included on the agenda, please get in touch.

Looking further forward, on 3 September 2024, we have a meeting with the Joint V Law Societies consisting of Manchester, Leeds, Bristol, Birmingham, and LLS. To repeat the request above, if anyone has any items that they wish to be included on the agenda for this meeting, please get in touch.

Nominations are open in July for the Annual Dinner and Legal Awards on 14 November 2024, so get your applications prepared and lodged before the deadline of 6 September 2024. As I have mentioned a few times, **Lady Hale** is our guest speaker, and it is already looking to be a magnificent evening.

Gaynor Williams
President

president@liverpoollawsociety.org.uk

LLS Meetings & events – June 2024

Start Time	Meeting/Event
04/07/2024 12:30	LLS bicentenary working party
09/07/2024 12:30	General Committee
10/07/2024 13:00	Employment Law Sub-Committee
16/07/2024 13:00	Editorial Sub-Committee
17/07/2024 13:00	Civil Litigation Sub-Committee
18/07/2024 13:00	Directors and LCR Councillors' Meeting
30/07/2024 12:30	Finance & Policy Sub-Committee
31/07/2024 13:00	Equality, Diversity & Inclusion 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
Access to Justice	Modernising support for independent living: the health and disability green paper	22.07.24
Criminal Practice	Non-fatal strangulation and suffocation offences – consultation	12.08.24

Criminal practitioners sought for Society's specialist committee

Liverpool Law Society's Criminal Practice Committee (CPC) is looking for new members. This committee seeks to identify important issues, both local and national and to give voice to the concerns of the profession. We liaise with all Government bodies including Local Crown Courts Magistrates' Courts and the Legal Aid Agency, Police and Local

Government to try to ease the burden for all solicitors in practice. We consider all government-initiated Consultation papers and endeavour to protect the private practitioner at all times.

Criminal law advocates of all levels of experience who operate within the Merseyside area and practice throughout



the country, in all Courts can become a member of the CPC so long as they are a member of Liverpool Law Society.

For further details and to apply to join the committee, see <https://www.liverpoollawsociety.org.uk/about/committees/specialist/criminal-practice-committee/>

Spotlight on: Anthony Neild, Director LLS



Anthony Neild, Cost Lawyer with JMW Solicitors LLP, has been elected to serve as Director of Liverpool Law Society for 2024.

Anthony is originally from Wavertree and has lived in Liverpool all of his life. He attended Maghull High school and after finishing his A levels went on to read theatre studies at Liverpool Hope University. Upon graduation Anthony had set his sights on pursuing post-graduate study and working in the arts education or arts management sector.

Upon completion of his degree, Anthony took a job working in the insurance industry as a motor claims advisor, which was initially intended to be a stopgap between graduation and finding an entry-level role in the arts sector. However, he went on to spend several years working for a major household insurer, handling motor claims involving policyholders who were at fault, with his primary objective being to reduce indemnity spend.

In 2012, Anthony moved to Carpenters Solicitors and took a role within the in-house claims department; acting for various insurers where he continued to hone his claims handling skills. At this point, he knew he wanted to do something else to further develop his skills and continue to use the critical faculty he acquired during his time at university but was unsure of exactly what. However, he had never envisaged a career in law.

It was during his time at Carpenters that a vacancy came up for a legal costs assistant, working closely with the wider litigation and finance teams. Anthony successfully applied. This position marked the start of his career in Law at the age of thirty. During that time, the Defendant litigation team was beginning to grow exponentially, as was the volume of work. Given Anthony's prior experience of claims adjusting, reducing claims spend and

negotiation, he was enlisted with the task of negotiating adverse costs claims for insurer clients whilst undertaking a limited amount of receiving party work in addition.

In a change in sides of the fence from Defendant to Claimant, Anthony joined an external costs litigation practice in 2014 whereupon he developed his skills in bill drafting, preparation of costs pleadings and negotiation covering a broad spectrum of work types. In making the change from Defendant to Claimant, Anthony was motivated by supporting lawyers who assist people who have been let down, wronged and have suffered as a direct consequence. The advent of costs management, LASPO and more recent changes have meant that costs professionals play a more involved role in the substantive litigation now more than ever and it is this which continues to retain Anthony's drive for the role.

Anthony later joined Tri Star Costs where he spent the next three years continuing to develop his practical skills in costs litigation whilst also studying to qualify as a Costs Lawyer. He qualified in 2019.

In December 2019, Anthony then joined Jackson Lees Group, initially as a Cost Lawyer before being promoted to Associate Director, during which time he gained hands-on leadership experience through being responsible for the day-to-day training, development and leadership of direct reports within the department. He continued to develop his skillset through taking on more advocacy work, handling costs claims for the civil liberties department and being involved in leading various legal projects across the wider business as part of his remit as Associate Director.

Anthony now works for JMW Solicitors LLP and is acting Costs Manager. His role sees him heading up the costs team and supporting the needs of lawyers across several litigation departments, in addition to running his own caseload. He is an accredited trainer via his regulator, the Costs Lawyers Standards Board and can deliver CPD training to other legal professionals. He

is also a dual qualified Fellow of CILEx and a certified Legal Project Practitioner.

Anthony initially became involved with LLS in 2021 whilst at Jackson Lees, when he was co-opted onto their Civil Litigation sub-committee. Anthony has and continues to provide legal costs updates to the committee regarding the ever-evolving changes to the practice area of legal costs, notable cases, and the practical implications these have for litigators.

In view of Anthony's ongoing involvement with the Civil Litigation Subcommittee, he decided to stand for election to become a director last November.

Reflecting on his appointment as Director, Anthony said *"I am immensely proud to be part of a regional law society that not only acknowledges but values the contributions of legal professionals who have reached qualification via less traditional means. I am excited to be the first qualified Costs Lawyer to join the board of directors at Liverpool Law Society, but I hope not the last. During the infancy of my directorship, I have enjoyed gaining an invaluable insight into the issues affecting lawyers and users of legal services from practice areas other than my own and the ongoing work of the other sub-committees in supporting the most vulnerable, driving diversity and equality within the profession and sustaining the future planning of the society."*

His immediate aims for 2024 as Director are to play a role in helping steer the LLS bicentenary celebrations, which will be an opportunity for the local legal community and further afield to celebrate and reflect upon the progress of the society as it has gone from strength to strength over the last 200 years. Anthony is also keen to play a more involved role in the training forum and looks forward to the remainder of his term.

Outside of work, Anthony enjoys reading, film, seeing friends and holidays in warm destinations.

We wish Anthony every success as Director for 2024.

Leaders in Law: Ian Cohen



1. Briefly describe your role as Managing Director of the Cohen Consultancy Limited.

My role is very varied and is totally dependent on how I can add value to my clients, be they a law firm or part of the legal supply chain. Typically, law firm owners reach out for support that focuses on their key priorities, which often includes improving profitability and cashflow. This then enables the owners to devote more of their endeavours to the strategic ambitions of the law firm.

I also see my role as being a constructive voice of challenge whilst at the same time to facilitating an opportunity to share their concerns and frustrations as it can be lonely at the top.

Ultimately, I'm a problem solver, whatever that problem may be when it comes to running a law firm.

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

The positives are that I feel that I can make a real difference to not only the performance of the law firm but critically to the wellbeing of its owners, by giving them the opportunity to resolve business challenges and improve their work/life balance.

The negatives are that I need to remember that as a consultant there

is only so much I can achieve when working with a client 1 or 2 days per month. This can be hard, as I naturally care about others and thrive on seeing successful outcomes.

3. What made you decide to set up your legal consultancy?

I have been very fortunate to have had a fulfilling and successful career as a medical negligence lawyer. It is an honour to represent those who suffer harm as a result of the medical care and to make a real difference in how they live their lives post injury.

As my career progressed, I quickly realised that I wanted to run and own a law firm, which I did for many years. I built a successful business that resulted in the opportunity to sell it to what was then the biggest listed law firm in the world, Slater & Gordon. After working at the firm for several years, I moved to Simpson Millar. Both these experiences allowed me to deepen my knowledge of how to run a law firm, and this included immersing myself in understanding how to collate and apply data and processes.

At the end of this time, and having come through Covid - which had an impact on my family and my own mental health - I decided I needed a change. I had the option to head up a Liverpool office for a National law firm but I decided that I wanted to challenge myself and to keep evolving, so I took the plunge and set up the consultancy with no clients and with 6 months to feed. Two years on, I have no regrets.

4. What do you see as the biggest challenges in running a law firm?

Whilst no one law firm is the same as the other, there are common issues that include:

- Acquiring the right work at the right price
- Processing the work in an efficient and profitable way
- Employing and retaining the right

talent, and not just fee earners.

- Reducing WIP lock up and ensuring the firm has sufficient liquidity and capital.
- Managing the supply chain.
- Being aware and willing to adapt to market and legislation reform.

5. As a specialist in Medical Negligence, what do you see as the biggest challenges for law firms that specialise in this area of law?

Put simply is the ability to preserve access to justice to some very vulnerable members of our society, whilst at the same time running a financially viable Department/law firm. This challenge is made all the more harder by the constant reform or the threat of reform that has hung over this area of law for almost the entire duration of my career.

I am certainly an advocate of improving the current system to ensure that clients receive specialist legal advice and that advice is given in a proportionate and timely manner. However, there is a balance to be had as some of the more recent reforms, as well as those still to come, have gone too far.

I also hope that Claimant law firms become better at embracing all forms of ADR. I am a firm believer that ADR benefits not only the client, but also the law firm as well as the clinicians involved on the Defendant side. I am very aware to the criticism directed at Defendants in not admitting liability quick enough or dragging their feet in the litigation process, but I believe the real driver for change needs to come from much greater adoption of ADR on the Claimant side.

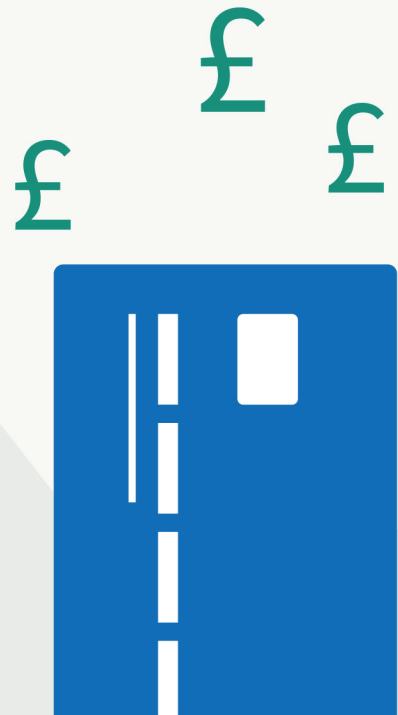
6. Where do you see yourself in ten years from now?

With 4 children, including 12 year old twin boys, I suspect I will still be working and trying to make a positive difference both at home and with my consultancy. I would also like to reflect on my beloved Liverpool FC having won many more Premier Leagues in that decade!

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Law firm O'Connors announces three promotions



Phil Bowers, Tash Lackner and Josh Bates

Liverpool and London-based firm of business lawyers and advisers, O'Connors, has promoted Tash Lackner, Josh Bates, and Phil Bowers in recognition of their contribution to the growth and development of the firm.

Corporate lawyer **Natasha** (Tash) Lackner becomes a Legal Director and will take the lead in driving the firm's national legal services sector strategy.

Regulatory & insurance lawyer **Josh Bates** becomes a Legal Director and will take the lead in driving the firm's national financial services sector strategy, including the recently launched PLUS+ service for lawyers, accountants and other professionals who need additional insurance and regulatory support on major client projects and transactions.

Commercial lawyer **Phil Bowers** becomes a Legal Director and will take the lead in driving the firm's national sport sector strategy.

Commenting on the changes, O'Connors' CEO, **David Malone**, said: "These promotions reflect the enormous contribution Tash, Josh and Phil make to the firm every day. As well as their important management roles, they each bring rare legal project management skill and clarity of thinking to their legal work, which is a hallmark of what we do in helping clients to manage their risk in important projects and transactions.

"Tash, Josh and Phil will be responsible for the development of ground-breaking solutions that help clients overcome the emerging and evolving challenges they face, and I can't think of a better way to make a difference in business life."

O'Connors provides a unique blend of corporate, commercial, insurance and regulatory advice for fast growing

and innovative businesses. The firm was founded in 2003 and comprises twenty-five lawyers and support staff.



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DWF appoints new managing partners in Liverpool and Leeds



Julie Simms



Andrew Batterton

DWF, the global provider of integrated legal and business services, has announced Julie Simms and Andrew Batterton as new managing partners of its Liverpool and Leeds offices.

Julie Simms takes the position of managing partner for DWF's founding office in Liverpool, succeeding Graham Dagnall, who held the role for the past five years. Julie has been with the firm for 17 years and a partner for the last 13 years. She co-heads a growing team within DWF focussed on the delivery of development related services to public

bodies and private sector promoters of nationally and regionally significant regeneration and infrastructure projects.

DWF's new managing partner in Leeds, **Andrew Batterton**, joined the business in 2021 from DLA Piper and heads the firm's development and infrastructure planning and compulsory purchase practice. Andrew continues to play a key part in the growth of DWF's full service offering to promoters of major development, infrastructure and energy projects. He takes up the position of office managing partner from Jonathan

Branton who held the role for the last three years.

Their appointments follow **Mike Renshaw's** recent appointment as managing partner of DWF's Bristol office.

Julie Simms said: "I am very proud to take on the role of managing partner in Liverpool. I am keen to build on what we have already achieved in the region and collaborate with colleagues and our clients, focusing on the positive role we can play in place based economic regeneration. I am committed to nurturing diverse talent across our business and look forward to continuing to work with organisations in Liverpool and Wirral on a number of our D&I and CSR initiatives."

Andrew Batterton, said: "It's an exciting time to be taking up this position as part of DWF's growth ambitions, given the vital role that our locations will play in providing an attractive and nurturing environment for our colleagues as well as our clients. We plan to build upon DWF's positive culture, core values and ways of doing business, including its market leading commitments to sustainability and ESG as part of our plans to engage with our local economy and wider community."

UK & Ireland regional managing partner at DWF, **Hilary Ross**, said: "We are delighted to announce the appointment of Julie Simms and Andrew Batterton as our new managing partners in Liverpool and Leeds. They both bring a wealth of experience to their new roles that aligns seamlessly with our purpose and of delivering positive outcomes with our colleagues, clients and communities.

"I want to extend my appreciation to Graham Dagnall and Jonathan Branton, both of whom remain with DWF, for their leadership and invaluable contributions to our Liverpool and Leeds locations."

Welcome to Warrington: Law Firm Opens Doors to New Office



Award-Winning law firm, Bell Lamb & Joynson celebrated the re-launch of their Warrington Office last week.

A warm welcome was on offer with a champagne reception, delicious cupcakes and plenty of buzz around the newly refurbished premises. The legal team celebrated the re-opening of their office with local property professionals, clients and staff from their various office locations in the North West.

The Warrington office is a listed building in the central location of Sankey Street, near The Golden Gates and beautiful green open spaces, Bank Park and Palmyra Square. The progressive law firm have been in the building for a number of years, however it was primarily used as a convenient place for colleagues to work from if they were attending court in Warrington and to see clients by appointment. It was not readily accessible to the public, properly launched or used to its potential.

After a period of growth, 2024 felt like the right time to maximise on the new opportunities that the Warrington Office could bring. After substantial refurbishment to increase capacity and

create a welcoming space for clients to attend meetings, the office was fitted out with a new kitchen, reception, interview rooms and a modern workspace for the growing team.

Commenting on the launch event, Managing Partner, **Mike Leeman** said: *"As the number 1 rated firm in Warrington on ReviewSolicitors, it made sense to re-launch the office and open the doors to the local community, who can access*

our award-winning legal services in the local area. There was a great vibe in the office for our launch party, thank you to everyone who attended and helped us celebrate".

Warrington marks the fourth refurbished office location for leading law firm, Bell Lamb & Joynson. They have well-established offices in Liverpool, Maghull and Runcorn, where their team of 75 legal professionals work across multiple areas of law.



Hill Dickinson announces summer round of partner promotions



L-R: Katie Austin, Joe Orme-Paul, Tim Unwin, Ruth Griffiths, Joanna Crichton, Rebecca Sharrock, Sion Davies, Richard Parker, Rizvan Rasul

Leading commercial law firm Hill Dickinson has announced the promotion of nine legal directors to partner across a variety of practice areas in its business services and health business groups.

The new partners span the firm's Liverpool, Manchester and Leeds offices, with the business services group making three legal directors partner, and the healthcare group promoting six to partner level.

As a result, in the past two years the firm has progressed 22 colleagues to partner through its internal promotion processes across all three of its business groups and a broad range of its locations.

The full list of promotions for 2024 is:

- **Katie Austin** – Private Client, Liverpool
- **Joe Orme-Paul** – Employment & Education, Liverpool
- **Tim Unwin** – Real Estate, Liverpool
- **Ruth Griffiths** – Health Primary Care, Leeds
- **Joanna Crichton** - Healthcare & Public Law, Liverpool
- **Rebecca Sharrock** – Healthcare & Public Law, Manchester
- **Sion Davies** - Healthcare & Public Law, Manchester
- **Richard Parker** – Health Commercial, Manchester
- **Rizvan Rasul** – Costs Health, Liverpool (promoted to partner equivalent)

Nearly half of the partner promotions are women, which is strong evidence that the firm is actively committed to increasing

gender equality at more senior levels. In May this year, Hill Dickinson promoted ten women out of 16 senior associates to legal director.

Craig Scott, CEO at Hill Dickinson, said: *“seeing our talented colleagues develop their careers and ascending through the legal ranks here at Hill Dickinson is one of the most rewarding aspects of my role and these promotions reflect tremendous effort and dedication on their part over many years. To reach the status of partner is a fantastic achievement. This year we have seen impressive profitable growth in all areas of our business and these latest promotions are further evidence that we are committed, as a firm, to investing in the development of our people. They will be our future leaders, driving our continued success for years to come.”*

Brabners promotes four to partnership



Nik White, Leanne Intrall, Hannah Fawcett, Brendan McAleese and Fiona Tinsley

Leading independent law firm Brabners has promoted four colleagues to its partnership in the latest round of promotions following another year of purpose-led growth.

Hannah Fawcett (commercial & intellectual property), **Leanne Intrall** (family), **Brendan McAleese** (employment, pensions & immigration) and **Fiona Tinsley** (litigation) have all joined the now 90-strong partnership as the B Corp-certified firm continues to be recognised as the UK's 'Best Law Firm to Work For' by Best Companies.

Hannah Fawcett, a dual qualified solicitor and chartered trade-mark attorney who joined the firm in 2017, leads the beauty and fashion team within Brabners' retail sector offering while also playing a key role in developing its broader anti-counterfeiting legal services. With clients including outdoors and fashion brands Regatta, Craghoppers and Sosandar, Hannah is a committee member within the International Trademark Association (INTA) and recognised as a 'Rising Star' by Managing Intellectual Property specialist guide, IP Stars.

Both **Brendan McAleese** and **Leanne Intrall** joined the firm as trainee solicitors. **Brendan** specialises in both employment law and business immigration, with a particular focus on the healthcare and professional services sectors, while also actively managing the firm's relationship with the Association of European Lawyers. Advising on all areas of family law and financial matters, **Leanne** is also a qualified collaborative family lawyer. As well as being a member of the family law association Resolution and the chair of its Manchester YRes committee, she also plays an important role in Brabners' social impact work, leading its social mobility affinity group. Earlier this year she was named Legal Professional of the Year at the Made in Manchester Awards.

Fiona Tinsley joined Brabners' litigation team in 2021 and has since successfully established and grown its clinical negligence and serious & catastrophic injury team. Her team's work encompasses dealing with all aspects of medical negligence including relating to delay, misdiagnosis, mismanagement and consent issues.

The additions to the partnership come on the back of a record promotions round including 12 colleagues promoted to associate, nine promoted to senior associate and eight promoted to legal director within the business, which has now delivered seven consecutive years of growth across its offices in Liverpool, Manchester, Lancashire and Leeds.

Nik White, managing partner at Brabners, said: "*Brabners has evolved significantly over recent years, and that is reflected in our partnership which continues to welcome ambitious lawyers that live and breathe our values as well as our commitment to bringing about positive change. As someone who started their career with the firm, it's incredibly satisfying to see more and more partners enjoying the same support and progression as we continue to invest significantly in career pathways and strive to create a more diverse and innovative business.*"

For more information, visit: <https://www.brabners.com/>

O'Connors launches plus+ to support professional advisers



Josh Bates, O'Connors Legal Director and head of PLUS+

Liverpool and London-based law firm O'Connors has launched a new service called PLUS+ which enables lawyers, accountants, and other professional advisers to add O'Connors' insurance and legal/financial services regulatory expertise to their advisory team when helping clients to manage risks in projects and transactions.

Once coined 'the law firm for law firms', O'Connors is launching PLUS+ as part of the firm's national push into the wider professional services sector and builds on its established relationships with some of the UK's leading professional firms.

Professional advisers tend to need insurance and regulatory advice on an ad hoc basis, often when an issue is urgent or when the advice must have the benefit of legal privilege. PLUS+ provides ready access to this advice without having to commit to long-term retainers.

With the backing of PLUS+, professional advisers can forge new client relationships in regulated sectors, strengthen existing client relationships, overcome project and transaction obstacles, and deliver better results for their clients.

Typical situations where PLUS+ can make a difference are corporate, commercial, property and infrastructure projects and transactions, particularly those with a financial services or legal services element or where risk

management and insurance solutions can play a role.

The team behind PLUS+ is led by Legal Director **Josh Bates**, supported by **Sally Lazar, Kathryn Howard, Louis Hamilton**, and other members of the O'Connors team.

Commenting on the launch, **Josh Bates** said: "O'Connors has been supporting professional advisers involved in major projects and transactions on insurance and regulatory matters for many years and we have taken the opportunity to bundle the offering and recruit a team that can take the proposition to a wider national audience. There is nothing more satisfying than collaborating with fellow professionals to become part of their trusted advisory team and assisting them in bringing their clients' deals to fruition."

O'Connors was founded in 2003 and comprises twenty-five lawyers and support staff.

<https://www.oconnors.law/plus/>

St John's Buildings appoints a new Senior Clerk



Scott Baldwin

St John's Buildings Barristers' Chambers has announced the appointment of nationally respected clerk

Scott Baldwin to take up the role of Senior Clerk for the national set's Liverpool Chambers. Commencing in post in May 2024, Scott has over 30 years of experience as a barristers' clerk, with the last 17 years spent as the Chief Executive/Senior Clerk at St. Mary's Chambers in Nottingham.

An expert in fees matters and member of the Bar Council's Remuneration Committee and the Regulatory Group,

during the pandemic **Scott** played a key role assisting the Family Law Bar Association (FLBA) in liaising with the Ministry of Justice and Legal Aid Agency (LAA) to ensure continuation of services in the family courts and payment of legal aid fees. He currently works with the LAA to develop improved processes and guidance and has appeared as a guest speaker for the LAA in their webinar Family High Cost Cases: Help Us Say Yes.

Chris Ronan is the Chief Executive at St John's Buildings and recruited Scott for this role. "When I set out the requirements for the role there were three main criteria: a proven track record in developing barrister's practices, considerable experience in managing the needs of professional clients, and strong

ties to Liverpool and Merseyside. I am delighted that Scott has joined us as not only does he fit all of the criteria he is also a perfect match for the SJB vision, mission, and values."

Scott said: "This was a huge opportunity to work in one of the most prestigious barristers' chambers in the country, and one that I couldn't pass up. It was clear that the approach SJB takes to wellbeing aligned with my own, and the results of the staff engagement survey provided clear evidence of that approach working. Having made my home in Liverpool three years ago I feel like I really belong now that I also work in the city. I'm excited by the possibilities of working for SJB to develop the Liverpool team and to further immerse myself in the culture of Liverpool".

Carpenters Group grows Executive Board with Chief Operating Officer Appointment



Darren Hall

Carpenters Group, the insurance and legal firm, has appointed Darren Hall as its new Chief Operating Officer. Darren joins from Conveyancing Direct where he was Board Director and

brings with him a wealth of experience, previously being Chief Operating Officer at Countrywide Plc where he worked for almost 14 years.

He studied at South Trafford College before launching his career in the insurance and legal sector.

Donna Richards, CEO of Carpenters Group said: "We are delighted to have Darren join our team as Chief Operating Officer. This is a new role for Carpenters Group and a new area for Darren. His experience of operational excellence and leading change will add to and strengthen our Executive Board. Darren has a wealth of successes in operational and leadership roles from which we will benefit and we are all excited for him to get started with us."

Darren said: "I am really pleased to be joining Carpenters Group – a well-known company with a great reputation in the insurance and legal sector. Everyone has made me feel so welcome from the first minute and we have bonded over shared ambition for excellence, I am extremely excited to be joining such a brilliant business."

Outside of work Darren enjoys spending time with his family and taking his two boys, 4 and 8 to everything football - games, practices and parties. He says it may sound like a bane but he absolutely loves it! Darren also likes to spend time socialising with friends and spends every spring in the gym trying to get fit again in time for summer!

Fletchers set for next stage of growth after Pemberton agrees refinancing package

Fletchers Group, with offices in Liverpool and Southport, has agreed a new re-financing deal which will equip the business for the next stage of growth.

Chief Financial Officer Alex Lynch said the deal will support Fletchers in driving growth in the medium term as the business extends its position as a leader in serious injury and clinical negligence.

She said: "Our sights are set firmly on reaching our medium-term target of achieving £150m in revenue with a team of 1,500 colleagues, and this new agreement, signed with Pemberton, is an important step in that direction."

Pemberton is a leading European asset manager specialising in private debt and backed by Legal & General. Lynch explained that Pemberton is providing a long-term loan which Fletchers will use to settle current bank, vendor and acquisition loans.

She added "As well as consolidating all our debt under one group facility, Pemberton will also provide an acquisition fund to support our inorganic growth strategy and enable us to move quickly to fulfil our pipeline opportunities."

She said that Fletchers will continue to partner with RBS, the Group's bankers for more than 20 years, who will provide working capital via a revolving credit facility to support their continuing investment in growing their WIP book.

Lynch said the new arrangement was a vote of confidence in Fletchers Group, its track record to date, its forward strategy and its people and culture.

"When Sun European affiliates invested in Fletchers in October 2021, we had approximately 450 people and revenue of £34m. Now, with Blume, Cycle SOS, Minton Morill and Serious Injury Law in the Group portfolio, we will hire our

1,000th colleague and break £100m in revenues by the end of this financial year."

"The process has given us a great opportunity to sell the merits of our industry in general and Fletchers Group in particular, and we are thrilled to have Pemberton on board for the next phase."

Cassandra Fahy, Managing Director – Origination, of Pemberton said: "Fletchers Group made a compelling investment case, and we are delighted to support Peter [Haden], Alex and the rest of the team achieve their ambitious plans."

She added: "Fletchers has delivered impressive growth over a period of regulatory and market change and is now well placed to capitalise on their leading position in a market where technology and scale are key differentiators."

For the transaction, Fletchers was advised by Rothschild, PWC, EY and Addleshaw Goddard.



Annual Dinner featuring Legal Awards

Liverpool Law Society's 2024 Legal Awards

NOMINATIONS ARE OPEN!

CATEGORIES

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

With eight categories to choose from, we are confident there is something for everyone. Open to Liverpool Law Society members only.

For further details & to nominate, [click here](#).



The winners of the 2024 Legal Awards will be announced at the Society's Annual Dinner on Thursday, 14th November 2024. Nominations close 12pm on 6.9.24

SPONSORED BY



Carpenters Group appoints Head of Brand and Communications to Operations Board



Lynda Thwaite

Carpenters Group, the insurance and legal firm, has appointed Lynda Thwaite as its new Head of Brand and Communications. Lynda will sit on the Operations Board and oversee the Brand, Marketing & Communication department.

Lynda joins the business from Sir Robert McAlpine Ltd, where she has worked since 2017, as Executive Director - Brand, Marketing & Communications and sat on the Leadership team. Lynda brings with her over 25 years' experience across a variety of sectors.

Donna Richards, CEO of Carpenters Group said: "We are delighted to have Lynda join our team as Head of Brand and Communications and member of our Operations Board. Lynda's experience will benefit our business from both an internal

and external perspective and provide excellent leadership for the team. From the first minute we met we all knew she was the right person for the role and a perfect fit for the business."

Lynda said: "I am proud to be joining such a well-respected and growing business in Carpenters Group, especially during our 30th anniversary year. A big factor in me making the decision to join was how closely our values aligned and how ambitious the business is about their future. I look forward to what we will achieve together."

Outside of work Lynda is a Board member of Social Enterprise 'The People's Pool'. She is also a Fellow of the Chartered Institute of Marketing and Chartered Institute of Public Relations and an advocate for women's leadership, equality and LGBT+ rights.



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Law Society Committee Social Event

On 13 June 2024, Liverpool Law Society held a social event for members of the various sub-committees, directors, and officers, at Tempest bar, on Tithebarn Street, Liverpool.

Haley Farrell, Deputy Managing Director and Head of Family Law at Broudie Jackson Canter, organised the event. It was scheduled to take place after the society's Family sub-committee meeting, which is also chaired by **Haley**.

Among the attendees, the President, **Gaynor Williams** was present, and it was great to see the event supported by the immediate past President, **Mr Jeremy Myers**. The attendees met up to discuss all matters relating to the law society and general social chat. As you can see in the

various photographs taken at the event, a great time was had by all.

Anthony Neild, newly appointed Director at the society, and a costs lawyer at JMW Solicitors, stated that it was a fantastic event and that he looked forward to taking part in future events with the society.

The social provided a great opportunity for the members of various committees to meet and share ideas. These types of events encourage greater participation of our members and their involvement with the sub-committees, offering a relaxed environment to discuss issues.

Whilst the society hosts larger events such as the annual dinner and awards,

we consider that it is equally important for engagement to host smaller events. By sharing ideas and listening to our members views, this gives us an opportunity to shape future events and take on board ideas for the running of the committees.

If you are interested in joining one of our sub-committees, then please see the links at page 6 of the magazine for contact details.

Thanks go to **Haley** for organising the event and we look forward to seeing you all at the next one.

Alum Ullah
Joint Honorary Secretary
at Liverpool Law Society





Merseyside Junior Lawyers Division



Callum Waterhouse

The MJLD is delighted to announce that we will be holding our annual summer ball on the 10th of August 2024 at The Bentley, Liverpool.

Our summer ball will be a Bridgerton themed ball. Please join us for an amazing evening of dancing, dining and networking with other firms and MJLD members.

There will be live entertainment, a charity raffle and our very own annual junior lawyers awards. The three award categories this year are the Legal Excellence Award, the Care in the Community Award and the Supporter of Rising Talent Award.

Table tickets are currently available with a table of 10 at our annual sold out ball is £600.00. A full table consists of ten attendees, a three course meal, meal drinks and a welcome drink on arrival as well as the brilliant entertainment that we have lined up and our charity raffle which supports our chosen charity for the year, Centre 56. If you are interested in purchasing a table for your junior lawyers and employees please contact our Chair, Jemma Castell at Jemma.Castell@pinsentmasons.com and our Vice-Chair, Beth Walker at BWalker@broudiejacksoncanter.co.uk. As always, our summer ball also includes our Annual Awards

(consisting of the Legal Excellence Award, Care in the Community Award and Supporter of Rising Talent Awards). Nomination forms for the awards have already been sent out to firms on the MJLD contact list, however, if you have not received the form please contact our Chair and Vice-Chair at the above email addresses.

We are very excited to see the Merseyside legal industry and our MJLD members once again for what will be an amazing night at The Bentley, Liverpool.

Callum Waterhouse
MJLD Social Representative
Fletchers Group



EDI Meeting – May 2024

We had the pleasure of having Rachael Stalker; LJMU Lecturer and Director of LJMU's Legal Advice Clinic speak to us about the Clinic; who they are, why they exist, and why they matter from an EDI perspective.

The Clinic is one of the largest of its kind in Europe; with 84 external solicitors volunteering to supervise the students working there. The Clinic has had national recognition; including being highly commended by the House of Lords and being declared a Law Society Legal Hero!

The need for such Clinics to exist is clearly necessary from an EDI perspective; as it allows disenfranchised people to obtain guidance and support. With the average reading age in the UK being 9 years of age, legal documents may be far beyond the comprehension of many people. To be frank, even without there being a language and/or literacy issue, for a layperson the system can be stressful, confusing and time consuming; so having this Clinic to help them with such documentation without judgement is so important.

Access to Justice is a major issue that continues to be under threat, and there continues to be barriers to justice; not only to those who have trouble with the English language (with the most spoken languages in Liverpool after English being Arabic and Polish), but even to non-native students.

With the support of volunteer Solicitors from within the City, the Clinic provides guidance and support with things like court orders and legal correspondence; not just legal translation but comprehension. They assist with a variety of issues; from a family dispute, to assisting small local businesses with HR policies, helping

females of colour leaving prison to return to work and be reunited with their children, and even supporting people in starting businesses.

Additionally, the Clinic allows the Law Students an amazing opportunity to gain real legal experience; from obtaining basic office/administrative skills from undertaking tasks such as time recording, to being able to conduct interviews with clients (with the support of a Solicitor) and providing advice accordingly. Every student who wants to volunteer can gain experience doing pro-bono work for the clinic; and get credit to do so. If the student is undergoing the SQE, volunteering at the clinic can be classed as contribution!

In respect of the gender gap; **Rachel** advised that when the Clinic was an extra-curricular and voluntary position offered to the students, only female students were involved. However, once the Clinic formed part of the curriculum, the attendance from a gender perspective more accurately reflected the student population; being 2/3 female and 1/3 male.

From a social mobility perspective, **Rachel** advised that the clinic forming part of the curriculum further opens doors for students who otherwise would not have been able to obtain such experience; due to anything from lack of connections, to possibly having other external responsibilities like a child, or acting as a carer for a relative. Rachel went on to say that if a person has a parent who is a solicitor, they are 17 times more likely to become one than say someone on the course as a first generation University Student.

In respect of the work itself, **Rachel** confirmed it is intensive, character-building and incredibly rewarding;

but they turn away three times more people than they can help; due to receiving clients not only through word of mouth, but also referrals from GP's/MP Clinic/Court. However, even those who do not have the capacity to assist will be signposted to someone who (hopefully) can.

The Clinic are always on the look-out for more Solicitors to volunteer; and they are currently really struggling to obtain someone with a knowledge in Housing. If anyone is interested in volunteering, please contact **Rachel** on r.stalker@ljmu.ac.uk

We went on to discuss the EDI Event we are hoping to have arranged for September. Our intention is to work in conjunction with the Judiciary to prepare an event to discuss the need and ways to increase diversity within the Judiciary, and within the higher echelons of the legal profession. Although as shown by the above measure of the female to male ratio in the LJMU course, there are more women than men entering the legal profession, this is not reflected in Senior positions; be that within Solicitors Firms or within the higher positions of the Judiciary. I acknowledged how fortunate I am to work in a firm where the Partner level is equal between men and women (albeit there is no diversity otherwise; in respect of ethnicity/disability/orientation) but also that Carpenters Group is in the minority in respect of achieving this. The aim of such an event is to encourage thought, debate and introspection as to the reasoning for the lack of diversity in senior roles within the legal profession, with hopes of sparking change. The planning of such an event is certainly still in the early stages, but we will of course keep you posted.

Amy Rachel Planche
Carpenters Ltd

Leaders in Law Dinner



President welcoming all to the private dinner

On 19th June 2024 Liverpool Law Society hosted a 'Leaders in Law Dinner' at The Bluecoat Arts Centre in Liverpool. Built in 1716 originally as a charity school, Bluecoat Chambers in School Lane is the oldest surviving building in central Liverpool. The school moved to another site in Childwall in 1906, and the building was rented by Sandon Studios Society. Subsequently, the Bluecoat Society of Arts was created in 1927, the successor organisation to the current and thriving Bluecoat Centre for Art. It lays claim to being the oldest arts centre in Great Britain.

The Bluecoat Arts Centre was a stunning venue for this event aimed solely at senior members of Liverpool Law Society and blessed with the first sunshine of the year we were able to have drinks in the beautiful courtyard before going inside for a delicious meal with good company.



The event was well-attended, with representatives from 7 Harrington Street Chambers, Astraia Linskills, Bell Lamb & Joynson, Bennett Williams Solicitors, Brabners, Carpenters, Cullimore Dutton, Donoghue Solicitors, DWF, Excello

Law, Fletchers Group, Graystons, In-House Legal Solutions, Liverpool Law Society, Morecrofts, MSB, Peter Edwards Law, Taylor Wessing, The Cohen Consultancy, The University of Law, Weightmans and WP Thompson.



President and Vice President

The evening was supported by Miller Insurance. The President, **Gaynor Williams**, welcomed the attendees, and introduced **Taurai Ushe** of Miller Insurance, sponsors for the evening. **Taurai** explained that Miller are new to the Professional Indemnity Insurance market. They bring a personal and local presence with all the knowledge and weight of the London Market. They offer a tailored, bespoke and personal offering to their clients, already representing around 2,500 law firms. We were honoured to also have **Kerry Greenwood** and **Marianne McWilliams**, brokers from Miller Insurance, who bring over 30 years of experience with them, offering best value, risk management and extensive knowledge, promoting thought management and growth for their clients, being client focused brokers who understand the



specific requirements of law firms. The Bluecoat Arts Centre added to the personal welcoming atmosphere of the night and was a beautiful venue, including a delicious three-course dinner. There was a jovial and informal atmosphere throughout the dinner encouraging interesting discussions and some comical moments, such as a group of senior lawyers pooling their extensive knowledge to solve “*the case of the broken heel*”. There were thoughtful discussions about future networking, training and events for the

members and we will be feeding back that knowledge to our sub-committees.

Thank you to everyone who attended the dinner, and we are grateful to the Bluecoat Arts Centre for their excellent food and service. A special thank you to **Taurai, Kerry and Marianne** from Miller Insurance for sponsoring the event, and of course thank you to our **President Gaynor Williams**.

Sarah Mansfield
Deputy Vice President



Miller Insurance representatives with President and Deputy Vice President

Legal Walk 2024

How quickly does the Liverpool Legal Walk comes around.

This year's event will take place on Tuesday 1st October 2024 at 1730 for 1800 at the Queen Elizabeth II Law Courts in Derby Square.

This is now an important event in the Liverpool Legal Calendar. It is a great opportunity to spend a couple of hours walking 5km around Liverpool City Centre and Waterfront and to meet up with local colleagues.

But it is mainly about raising funds for Access to Justice. All money raised goes

to the Access to Justice Foundation who provide essential funding to organisations that give free legal advice and help to those in need.

Things are a little different for the 2024 walk. Following changes at the Foundation, most of the planning for the walk is done locally. It is in reality a joint effort between me and Liverpool Law Society! You can register your firm, chambers or yourself via this link – [Liverpool Legal Walk 2024 | Liverpool Law Society](https://www.liverpool-lawsociety.org.uk/legal-walk-2024)

There are no separate teams this year. All funds are channelled through the

Walk's designated Just Giving page available via this link –

<https://www.justgiving.com/page/llw2024>

The idea is that you or your organisation will get sponsors and then transfer funds. All donations will be made to this page. So there will be no separate tracking online.

We are aiming to raise £5000 this year. We will post regular updates as we approach the big day!

Steve Cornforth



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6PM, TUESDAY, 1 OCTOBER 2024

5k fundraising walk in aid of



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ACCESS
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FOUNDATION

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THE LIVERPOOL LEGAL WALK GATHERS THE LOCAL LEGAL COMMUNITY AND SUPPORTERS OF ACCESS TO JUSTICE TOGETHER TO WALK 5K AROUND LIVERPOOL CITY CENTRE TO RAISE FUNDS FOR THE ADVICE SECTOR



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The money you raise goes towards the most vulnerable in society to fund access justice and legal advice. The organisations the Access to Justice Foundation supports help:

- Prevent families being made homeless
- Prevent destitution
- Allow older people gain the support to which they are entitled
- Support women and children who have been trafficked for domestic servitude or prostitution.

At the end of the 5K fundraising walk, each walker will have a chance to relax, mingle and network at our post-walk drinks reception kindly sponsored by the University of Law.

IN AID OF THE ACCESS
TO JUSTICE
FOUNDATION



This is a great opportunity for colleagues from across the region to come together and take part in a relaxed event after work.



[More info](#)

The Hilbre Walk - Sunday 2nd June 2024

Any day out for a walk is a marvellous chance for people to break the ice and to get to know more about each other outside the more formal meetings and Dinners. The annual outing for members of both Liverpool and Cheshire & North Wales Law Societies is a perfect example.

This year was Cheshire & North Wales's turn to lead the walk and Nicola Walker of the University of Law – also involved with Liverpool Law Society – carefully prepared our trip by reference to the tide timetable and the Friends of Hilbre's Open Day. Seventeen people and two dogs made the trip from West Kirby under grey – but dry – skies. The mix of people was widened as usual by family members outside the legal profession, so not too much “shop-talk”, and a good range of people across the age spectrum.

Soaking in the views across to North Wales and back to the Wirral is always absorbing. few of took binoculars so it was particularly rewarding to look further afield. We enjoyed our sandwiches on a hillside looking over the vista from the main island, after wandering around each of the three islands. The Open Day enabled us to hear from the Friends of Hilbre about the history of the islands and to enter some of the buildings available to view for that special event. There was amazing detail of the prehistoric fossils plus information about far more recent centuries when telegraph, lighthouse and sea rescue services were based on Hilbre.

There were plenty of people strolling out on the sands as we made our way back to West Kirby, proving the enduring popular appeal of the trip. So, thanks go again to Nicola, and to colleagues and family for taking the time to make it a memorable day. I hope that our photos encourage others to visit to Hilbre and to join next year's walk - venue yet to be decided!

Jeremy Myers



MSB Drag Bingo



MSB Drag Bingo returned this Pride Month to fundraise for the Liverpool Citizens Advice Bureau LGBTQ+ Hate Crime Support Team. The event was well attended by local firms and chambers and raised over £600.

The night itself was light-hearted, but it centred on the work of the Hate Crime Support Team whose services are sadly increasingly needed in the region. The team offers tailored

support to those who have experienced an LGBTQ+ hate crime including helping victims to report to the police, understand their rights, and access specialist support services.

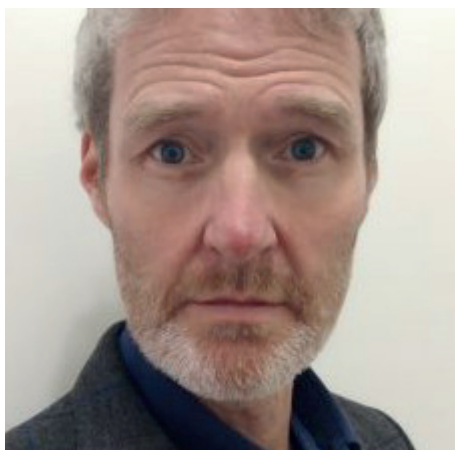
Managing Partner **Emma Carey** said, “I was so proud to see the event our LGBTQ+ committee had put on to celebrate diversity but also to raise money for an amazing cause that supports the LGBTQ+ community in tackling hate crime. We have come a long way and have a lot to celebrate but there is still a long way to go. It’s important for me that at MSB we are active allies not bystanders”.

MSB are committed to promoting the interests of the LGBTQ+ community and specialise in a range of services including criminal injuries compensation, protective injunctions, change of name deeds, surrogacy and adoption.

MSB look forward to marching at Liverpool Pride in July and celebrating Manchester Pride in August.

Holly Knowles
(Trainee Solicitor)

Joint Forum receives guests from National Audit Office and the Legal Aid Practitioners Group



James Mannouch



Kemi Duroshola



Chris Minnoch

Liverpool Law Society's Joint Forum on Access to Justice Group met in May.

It was a popular Forum with attendees from law firms and advice agencies in addition to elected representatives and academics.

The Joint Forum sits alongside the Society's Access to Justice Committee. It promotes information sharing and networking.

Each Joint Forum has a theme. This Forum focussed on reforms to legal aid, and we enjoyed excellent presentations from our two guest speakers.

The first presentation was kindly provided by **Kemi Duroshola**, Manager - Value for Money, National Audit Office. The National Audit Office (NAO) supports Parliament in holding the government to account and helps improve public services through its high-quality audits.

Kemi discussed changes to legal aid over the past decade. In 22/23, the legal aid budget was £1.86b. This was a real terms reduction of £728m from the position a decade before.

It is important for the Ministry of Justice (MOJ) to appreciate the impact of this reduction and the changes that have comprised it. Issues to account for include a removal of early advice, the increase of litigants in person and a decrease in certain forms of mediation. Added to this has been increased pressure on courts, health services, housing services and local authorities - particularly for immigration (families with no leave to remain rights). The MOJ has a statutory duty to provide legal aid, but the NOA reports that the MOJ hasn't produced sufficient data to understand whether it was fulfilling its duty in terms of supply and demand. Part of the reason for this is the MOJ's reduced use of surveys. **Kemi's** presentation was very well received and a useful discussion followed with attendees directed to key sources.

The Forum then heard from **Chris Minnoch**, CEO of the Legal Aid Practitioners Group. **Chris** was a housing practitioner for many years, and he focussed his talk on this area of practice. **Chris** suggested there has been a reduction in the overall number of firms offering legal aid, as evidenced through statistics. For example, in

2012/13 there were 2,962 legal aid providers nationally but by 2022/3 this had fallen to just 1,964 providers, i.e. a 44% reduction. In terms of legal aid providers offering housing advice and assistance, there were 728 providers in 2012/13, falling to 324 in 2022/23, a 55% reduction over the same period. A reduction has similarly been witnessed in the Liverpool City Region (LCR). There are currently 5 housing providers in the LCR spread across 7 offices, but these must service up to 1.5 million people within the region. **Chris** mirrored a theme provided during **Kemi's** talk; the suggestion being that by failing to survey the correct data the MOJ is unable to provide adequate responses. **Chris's** talk led to a lengthy discussion and attendees were directed to several useful sources including Legal Aid Provider Dashboards.

The next Joint Forum is due to take place Friday, 18 October 2024, 10.30am – 11.30am. All are welcome. Please contact **Ann Murphy** - annmurphy@liverpoollawsociety.org.uk - for more information.

James Mannouch
Chair

Resolving Family Disputes outside of the Court Arena, One Step Closer?

On 29 April 2024 the Government made changes to the Family Procedure Rules.



Fiona Davidson

What does it mean and what is NCDR?



The changes are aimed at encouraging parties to both children and financial remedy cases to look at non court dispute resolution in more detail at all stages of their dispute. NCDR is non court dispute resolution including mediation, arbitration, neutral evaluations such as Private FDRs and collaborative law, the list is deliberately not exhaustive. The aim is to reduce the burden on an already stretched family court.

There have been updates in terminology particularly with

reference to 'domestic violence' which has been replaced with 'domestic abuse' in line with the Domestic Abuse Act 2021.

Whilst domestic abuse will still be an exemption from attending a mediation information assessment meeting (MIAM) there are tighter controls on who would be exempt from such a meeting and evidence will be required in certain circumstances. The exemptions as currently outlined in Part 3 allows individuals to bypass the mediation process in certain circumstances such as cases involving domestic abuse, urgency or where mediation is deemed inappropriate. From the 29 April, parties must genuinely explore mediation and other NCDR options before issuing proceedings with a narrowing now of the permitted exceptions to those where it would be clearly impractical or unsafe.

Although it will still not be compulsory to attend a Mediation Information and Assessment Meeting (MIAM), the changes will make it harder to avoid doing so. This is designed to ensure that individuals are well informed about NCDR options, its advantages and the potential consequences of bypassing it.

It is intended that there will be a more rigorous assessment of cases where mediation and other NCDR options have been deemed inappropriate. The Courts will therefore be granted additional discretion to scrutinise claims of inappropriateness requiring parties to provide compelling evidence to support their request for exemption and penalise uncooperative parties if necessary as well as adjourn and suspend proceedings to allow those to be explored further.

Where cases involve allegations of

abuse, more consideration is expected to be given to how they are approached rather than maintaining a blanket exemption to NCDR options. This will now include for example how the structure and format of mediation could be shaped including the involvement of solicitors and the input of domestic abuse (or other) experts to ensure the safety of all parties involved in NCDR processes.

One of the main changes for practitioners, is that parties are now required to file and serve a standard form (FM5) setting out their views on engaging with non-court dispute resolution (except in cases where domestic abuse is in issue). This form will have to be filed and served before the first "on notice" hearing, and, if the court so directs, before any subsequent hearing in the proceedings. The court will now have the ability to stay cases until parties have engaged in NCDR. This was recently evidenced in the case of *NA v LA* [2004] EWFC 113 when Nicholas Allen KC stayed the case and the parties were to inform the court what engagement if any, there had been with NCDR as well as whether issues had been resolved and their proposals for the way forward.

Failure to engage in NCDR may also result in costs sanctions.

Whilst some Judges have been reported to take a robust approach such as Nicholas Allen KC, it remains to be seen if fellow Judges will take the lead and follow suit. Whether there will be a greater take up of NCDR, thereby freeing the courts for those cases where the need for judicial involvement is imperative, we will have to wait and see but perhaps we are one step closer, only time will tell.

Fiona Davidson
Weightmans



**Vauxhall Community
Law & Information
Centre**

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



Welcome, Esther! Our New Justice First Fellow

We recently welcomed a new member of staff to our team under the Justice First Fellowship - **Esther Sills** - who joins us whilst in the process of completing her LLM in Legal Practice.

[The Justice First Fellowship](#) began in 2014, set up by The Legal Education Foundation which founded the fellowship to provide an access route to a career in law, with a focus on social justice.

The fellowship consists of two years of fully funded training, alongside a personal project that should aim to advance access to justice. Alongside

this, the participant is given support and development assistance in their project and network building. We're delighted to be working with our second Justice First Fellow, and proud to be a host for the one of next generation of social welfare lawyers.

Esther has already made a huge impact in her time so far at the law centre, and we're thankful to have her as a member of our growing team.



Lawyers on the Streets of Birmingham

This month **Ngaryan, Emanuele and Sam** spent two days in Birmingham as part of the Law Centres Network's annual conference. This year the focus was on 'Unleashing the Power of Network', discussing the future of Law Centres and how we can best harness the potential of the network. They participated in workshops that looked at both how things currently work, as

well as how we all see the future of Law Centres, and what we can do to achieve a positive future.

It was a great opportunity to chat with other team members from Law Centres around the country, to learn about their hard work and the issues they face day-to-day. We were also given the chance to share our own stories and views, and what we felt could be positive changes that could benefit Law Centres.

We'd like to say a big thank you to LCN for organising the event, and a thank you to everybody who helped make the conference such a special event.

Siobhan's Legal Hero Nomination

Our Senior Housing Solicitor **Siobhan Taylor-Ward** was recently short-listed as one of The Law Society's Legal Heroes. This recognition is for solicitors who 'have made the biggest difference to the lives of others, their local communities and society'.

Siobhan was nominated thanks to her passionate and committed ongoing work with those affected by housing issues and homelessness in Liverpool. We're incredibly proud that **Siobhan's** work as part of our housing team has been recognised in this way. Both the valuable impact it has on individuals, and the structural changes she has called for within the Local Authority's housing services have been important and major contributions to our vital work as a Law Centre.

Congratulations **Siobhan**!

[Read the full list of nominations here.](#)



Legal Hero shortlisted nominee



A Recent Housing Case Study

Our client came to us after receiving a warrant for eviction under Section 21 (no-fault), and was due to be evicted the following day. They suffer from PTSD and other mental health conditions and rely on their dog as an emotional support animal. They were understandably in great distress having spent more than six months to get a response from Housing Options, not knowing what would happen to them on the day of the eviction.

We began by contacting the support agencies involved to obtain medical evidence of the above-mentioned conditions and then contacted Housing Options to explain the legal duties they owed to our client. We asked that suitable accommodation be provided by the morning of our client's eviction to avoid litigation in the case. We were then able to ensure that Housing Options provided them with suitable accommodation, allowing them to keep their support dog, and avoid any further period of uncertainty or the possibility of rough sleeping.

The client also gave us some great feedback: *"I'm still in Liverpool and I never have to deal with [landlord] ever again I finally have peace in a way from an 8-month battle from hell, you've been amazing I appreciate all this...
...I'm here now thank you very much for getting me out of a bad situation, I'm glad I never have to see [landlord], you have been amazing"*

Impact Report

We're so proud of all the hard work our solicitors and advisors do for their clients. It's impossible to measure and share all of the hard work they do for their clients, especially when it comes to showing the important work our housing team do, but we feel this gives a demonstration of just how much of a financial benefit their work has for our clients.

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 promoting access to

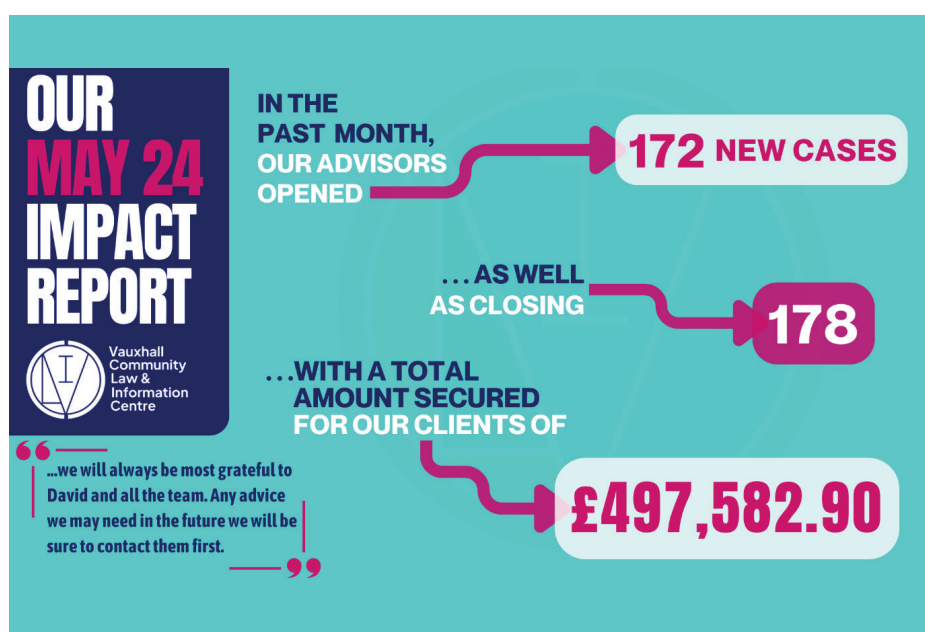
justice during the cost of living crisis has been immense. We get support from our volunteers in many different ways:-

- 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 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 meet some of your company's Corporate Social Responsibility commitments and supporting the local community.

Alternatively, we would be grateful if you would consider [donating](#) to support our organisation's work in providing access to justice to those who need it most. [Further information can be found here.](#)



Free Affiliate Membership of Liverpool Chamber for LLS members



Gaynor Williams

Liverpool Law Society (LLS) is delighted to confirm it has, once again, secured a free 12-month affiliate membership of the Liverpool Chamber of Commerce for corporate member firms of the Society as a benefit of annual LLS membership.

"Liverpool Law Society has a long-

standing close relationship with Liverpool Chamber of Commerce. Member's interests are at the heart of both organisations. We welcome the opportunity for our members to join Liverpool Chamber of Commerce's free affiliate membership scheme. This allows our members to enjoy Liverpool Chamber's membership offers and attend the various business networking and social events. It is good for our members to have opportunities to meet other like-minded businesses, which encourages friendship and opens up further business opportunities for our members in the Liverpool City Region." says **Gaynor Williams**, President of Liverpool Law Society.

The affiliate membership offers a suite of services to boost profile, gain valuable insights and enjoy free entry to Chamber events that are run in association with ourselves.

Liverpool Law Society Affiliate Member Benefits:

- Organisational profile on the Liverpool Chamber website
- Use of Chamber member logo
- Quarterly magazine subscription
- Member discount for Chamber Day at Aintree races tickets
- Free entry to Chamber events that are run in association with Liverpool Law Society

Please note, membership of the Liverpool Chamber of Commerce is on a firm-basis and not an individual-basis.

To request an affiliate membership application form, please email contactus@liverpoollawsociety.org.uk.

Additional Benefits of Upgrading to Full Membership:

- Free entry to all Liverpool Chamber networking events (usually two per month)
- Free entry to business network events (e.g. property and construction network, charity business network, school business network)

- Able to attend the Chamber Insights workshops
- Able to share news stories with other members through the Chamber 'News and Views' page and newsletter
- Free access to the 'Chamber Four Services' hotline and document library, including Chamber HR, Chamber Legal, Chamber Health and Safety and Chamber Tax
- Able to access chamber member discounts e.g. up to 67% AA discount

*Current 'full' members of Liverpool Chamber cannot re-join as Liverpool Law Society Associate Members. Affiliate membership does not include all member benefits as some are reserved for full members only. You can upgrade to the Chamber's full membership package to access a wide range of benefits. For details on upgrading, and other plans available please contact the membership team via membership@liverpoolchamber.org.uk.

Liverpool Chamber.

Liverpool Law Society

SAVE THE DATE 10.10.24
 5.30PM FOR 6.15PM, LIVERPOOL

Conkerton Memorial Lecture

By The Honorable Mr Justice Cobb

www.liverpoollawsociety.org.uk

The climate is changing, and so is the way you can assess its risks on properties

Introducing clients to climate change and its implications for their chosen property just got easier. The **Landmark Climate Change Report** utilises innovative mapping features, offering visual representations of flood risk, coastal erosion, heat stress and ground stability.

Empower informed decisions for your property with the enhanced **Landmark Climate Change Report**.



SCAN ME
for more
information



Liverpool Law Society's Inaugural Charity Golf Tournament 2024



On 6 June 2024 Liverpool Law Society held its first charity Golf Tournament at Caldy Golf Club, Caldy, Wirral.



Caldy Golf Club was an ideal venue, being an open links course, boasting magnificent views of the sea and Wales. The grounds are used by golfers to practice for the Open and they were in perfect condition.

The weather was unusually kind on the day, despite the cold and wet June we have had so far, there was much relief to see sunshine and to feel only a light breeze.

The main sponsor for the event was KE Costs Lawyers, and the Director **Kevin Fasting** joined the play with his golf team, after travelling up from London. The other sponsors were Quality PI, represented by **Simon Ong**, and HCE Enforcement Group, represented by **Jason Wynne Williams** (who

helped with the team photographs at the first hole), **Gordon Dean** and **Kelly Neile**.

The teams arrived in the morning to enjoy a tea or coffee and a breakfast roll, before setting off for a day's golf.

Sharon Stanton from Jaidan Events was an excellent organiser, after checking everyone's handicap each team were given score cards and goody bags with snacks and water for the day.

The teams who took part were *KE Costs Lawyers, Quality PI, Bermans, Bennett Williams Solicitors, Donoghue Solicitors, 174 Family Law, In House Legal Solutions, Keith Jones Partnership* and *Oriel Chambers*.

After a day of play the teams returned to the club house to refresh and relax in the sunshine before they made their way into the dining room for dinner.

The dinner, beef and Guinness pie with mash and vegetables, followed by sticky toffee pudding, was prepared by Pickled Walnut Catering.

The meal was followed by a personable and heartwarming speech from **Mark Evans**, Deputy Vice President of The Law Society.

Jane Richards, CEO and **Peter Sherlock**, Chair of Byrne Avenue Baths Charity attended the dinner and Jane gave a short talk about the work that the charity do in the community and how they saved the magnificent building, dating back to 1931, that still has the original swimming pool and public baths.

The attendees were very generous and over £1,000.00 was raised for Byrne Avenue Baths.

Congratulations to the winners of the first Liverpool Law Society Golf Tournament, Keith Jones Partnership, who received a winner's trophy, umbrellas, hats, golf balls and individual winner's awards. The

winner of nearest the pin and 1st individual best score was **Steve Swift** from Bennett Williams Solicitor's team. The winner of longest drive on hole 16 was **Luke Fitzsimmons** from Bermans' team.

The feedback was very positive, all the attendees enjoyed the event and the consensus was that the day and evening were a huge success.

There are a lot of people to thank for making the day a success. Firstly, thank you to the main sponsor KE Costs Lawyers, and to HCE Enforcement Group (thank you **Jason Wynne Williams** for all your help in the morning) and Quality PI, we are very grateful to them for their support. Also thank you to **Sarah Poblete** and **Liz Weeks** from Liverpool Law Society and **Sharon Stanton** from Jaidan Events for the excellent organisation throughout the day and evening. Thank you to Caldy Golf Club for hosting the event and for their excellent service, and to Pickled Walnut Caterers for the tasty food. Special thanks to **Mark Evans** from The Law Society, for attending and speaking at the event. Lastly, thank you to our member teams who participated in the event and the guests who joined us in the evening.

Gaynor Williams
President



Jason Wynne Williams from HCE Group Ltd and Daniel Stanton



The Keith Jones Partnership - winners of the Liverpool Law Society Golf Tournament



Steve Swift from Bennett Williams Solicitors winner of nearest the pin and 1st individual best score



Luke Fitzsimmons from Bermans, the winner of longest drive on 16th hole



Quality PI golf team



Oriel Chambers golf team



KE Costs Lawyers golf team



The Keith Jones Partnership golf team



174 Family Law golf team



Bennett Williams Solicitors golf team



Donoghue Solicitors golf team



Bermans golf team



In House Legal Solutions golf team

Free fully funded cyber security training for Merseyside lawyers

Cyber security is a fast-moving industry, as criminals use technology and AI to develop more and more sophisticated attacks. On top of this, lawyers may be at particular risk of cyber attacks due to the sensitive information they handle.

The recent Government's Cyber Security Breaches Survey 2024 found that half of all businesses, and a third of charities, had experienced a cyber security breach or attack in the last year.

There are several reasons why lawyers - and anyone working within law - need to be aware of cyber security risks. Lawyers have access to confidential client information, which could include financial records, personal data, and confidential business data. If this information is compromised, it could have serious consequences for the client, the lawyer and the law firm.

Anyone who works within law should be aware of the growing cyber risks, and ensure that they take proactive steps to protect their data and their IT systems against potential cyber criminals.

Fully-funded cyber security training

The North West Cyber Resilience Centre is currently offering free membership and a one-to-one training session for law firms based in Merseyside. This offer has been funded by Merseyside Police and the Merseyside Police and Crime Commissioner, with funds taken from proceeds of crime to be put back into the community.

The programme was launched last year - and still has places available on a first-come, first served basis.

The cyber security training can help lawyers understand the different types of cyber threats they may face, how to protect themselves from these threats,



L-R: DI Dan Giannasi, head of cyber and innovation at the NWCRC; Mayor of the Liverpool City Region Steve Rotherham; Chief Constable Serena Kennedy of Merseyside Police; Merseyside's Police Commissioner Emily Spurrell and Asif Hamid MBE, CEO of The Contact Company and chairman of Liverpool City Region Local Enterprise Partnership, who spoke about his experiences of a cyber attack.

and what to do if they are the victim of a cyber attack.

DI Dan Giannasi is head of cyber and innovation at the NWCRC, and is also a seconded police officer from the North West Regional Organised Crime Unit. He said: "We strongly advise any business in Merseyside to take up the offer of free cyber security training from our experts."

"As a not-for-profit organisation, which is backed by the regional police forces, we aim to help as many small businesses protect themselves against cyber crime as possible. Cyber attacks can be hugely damaging for any small business, but particularly law firms, who deal with lots of sensitive data and information."

In addition, the NWCRC offers affordable cyber services such as a Cyber Risk Assessment. This is a great place to start for any organisation to understand what technical and internal controls are in place and if they are sufficient.

Cyber security advice for lawyers who are looking to improve their cybersecurity:

- Use strong unique passwords and change them regularly
- Enable two-factor authentication on all of your business accounts
- Be careful about what you click on in emails and on the internet - and understand what a phishing email may look like
- Keep your software up to date on all computers, laptops and mobile devices
- Back up your data regularly
- Have a cybersecurity incident response plan in place

Find out more about the free training sessions and membership of the North West Cyber Resilience Centre by contacting: Niomie@nwcrc.co.uk or visit our website: <https://www.nwcrc.co.uk/>

Acts of Kindness are part of our city's fabric



Liverpool
BID Company

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



Julie Johnson

In our day to day business activity, how far do we think about kindness? It is one of the cogs in the wheel that help we operate day to day. A business culture that thinks about how its employees are faring can create more productive, happier and committed workforce.

This month Liverpool BID is joining with Mandela8 to celebrate Mandela Day, and we are encouraging businesses to join in the *Acts of Kindness campaign*.

Mandela Day takes place every year on the 18th July. Nelson Mandela inspired the idea for Mandela Day at his 90th birthday celebrations in Hyde Park, London when he said: *"It is time for new hands to lift the burden. It is in your hands now"*. The idea of Mandela Day is that everyone has the ability to make an impact and do something in their own way to change the world and the world of those around them.

Mandela8's Mandela Day: Acts of Kindness campaign (formerly 'My 67 Minutes') encourages everyone to take time out of their day to do something for someone else or for their community.

At Liverpool BID we are planning a series of events that you can get involved with to give back to others on 18 July, including community litter sessions and mindfulness sessions.

There will be community litter picks on Old Hall Street and Hope Street, as well as Princes Park.

Businesses can also submit their own Acts of Kindness, which can include anything from a coffee morning with staff to an organised city walk to blow off the cobwebs and help with mindfulness and relaxation.

Acts of Kindness are part and parcel of life in Liverpool and are an ingredient in the city's culture. How we weave them into our business life could have a positive impact on our commercial culture as well.

If you would like to organise your own 'Act of Kindness' for your business, you can get some ideas to plan your activities here – and be sure to get involved using [#MandelaDayAoK](#)

You can share your plans with us to be included in our social media campaign, just let us know what your business will be involved in.

Explore more at our website liverpoolbidcompany.com/mandela-day-acts-of-kindness/

Mandela Day AOK

Mandela Day Acts of Kindness
Thursday 18 July 2024



Liverpool
BID Company



Regulation Update

July 2024

The latest Regulation news from Andrea Cohen of Weightmans LLP



Andrea Cohen

The sun may not have yet arrived this summer but, fear not, we are back to raise the temperature with our usual overview of what has been happening in the last month in the world of risk and compliance, including recent SRA warning notices, regulatory and disciplinary decisions, and look ahead to what's on the horizon.

LSB approves SRA fee caps

On 14 June the LSB approved the SRA's application for approval of new regulatory arrangements: the SRA (Claims Management Fees) Rules 2024, which will impose fee caps for matters relating to financial services mis-selling claims, mirroring those applied by the FCA to CMCs, with maximum fees of £420 for claims less than £1500, to £10,000 for claims more than £50,000, with exceptions for complex or novel claims, to be determined by the SRA on an individual case basis. New information transparency requirements for firms handling financial services claims will be introduced. The fee caps do not apply to the BSB or CILEx and the SRA said it will be monitoring firms switching regulators to avoid the caps. The new rules will come into force on 26 July 2024. New guidance will be issued, with case studies, which will be reviewed and updated as necessary.

SRA updated statement on Post Office investigation

On 20 June the SRA updated its January 2024 statement (which, in turn, was an update on the October 2022 statement) on its investigation and advised that there are more than 20 live investigations into solicitors and law firms who were working on behalf of the Post Office/Royal Mail Group. The SRA is looking into a range of issues, including: management and supervision of cases; the strategy and conduct of prosecutions and of litigation; duties relating to expert witnesses; disclosure obligations and improper application of privilege to protect communications from disclosure; issues relating to the operation of the Post Office Complaint Review and Mediation Scheme, including overcharging of claimants, use of non-disclosure-agreements and labelling of correspondence. In addition it is considering conduct in relation to the ongoing public inquiry. The statement confirms the SRA will take action where it finds evidence of misconduct, and new issues are coming to light. It does not have evidence at present that urgent action is needed.

Compensation fund contributions increase

The SRA launched a public consultation on its 2024-25 business plan, budget and fee levels on 28 May which includes a proposed threefold increase in contributions to the compensation fund to £2220 for firms and £90 for individuals from October 2024. It is hoped this will deal with the shortfall from recent large interventions. Practising certificate fees will stay the same. Consultation on the practising fee and compensation fund contribution ran until 24 June 2024 and the consultation on the wider business plan closes on 2 July 2024.

Money missing from client account – warning notice

On 21 June the SRA published a warning notice [SRA | Money missing from client account - Warning notice | Solicitors Regulation Authority](#) in relation to money missing from client account, confirming that it *'must be replaced with extreme urgency'*, and managers are jointly and severally responsible for replacing the shortage. The firm's insurer and the SRA need to be notified. Even if the money is replaced, there is a risk of intervention by the SRA if there is reason to suspect dishonesty or serious breaches of the rules, and there may be offences committed under the Fraud Act 2006 if, once on notice money is missing, you do not act properly.

Mergers, acquisitions and sales of law firms – SRA warning notice

The SRA has issued a warning notice to firms and solicitors involved in acquiring, selling or merging their firm, including pre-pack sales/acquisitions [SRA | Mergers, acquisitions and sales of law firms - Warning notice | Solicitors Regulation Authority](#). This follows a number of high profile firm failures, including Axiom Ince and Metamorph, and precedes the results of the LSB review into the conduct of the SRA regarding Axiom DWFM takeover of two much larger firms and the £60m + 'shortfall'. On 24 May the LSB announced that, as a public body, it has to adhere to General Election guidance and the report will not be published until after the General Election. The notice reminds firms of their regulatory requirements, including ensuring that protecting clients' interests is at the forefront of considerations and are clearly documented, carrying out proper due diligence, prioritising urgent client matters, contacting testators for instructions regarding storage of wills and review of residual client account

balances. If a firm is going through financial difficulties, the SRA expects that in most cases a solicitor manager will be appointed (and if not, clear justification for why it was not thought necessary) to ensure client money, assets, confidential and privileged information is safeguarded and overall compliance with regulatory arrangements.

The Compli team is on hand if you need any advice or assistance, so please do get in touch if we can help you.

SLAPP issues

Following last month's update, the SRA have updated its November 2022 warning notice to solicitors regarding involvement in abusive litigation aimed at silencing legitimate critics, strategic lawsuits against public participation (SLAPPs), providing more detailed guidance and examples of circumstances when the SRA might take regulatory action. [SRA | Strategic Lawsuits against Public Participation \(SLAPPs\) - Warning Notice | Solicitors Regulation Authority](#) It includes further detail on the definition of a SLAPP, as outlined in the Economic Crime and Corporate Transparency Act 2023, information gleaned from SRA casework, the recent thematic review and also covers scenarios e.g. the 'right to reply' process.

The SRA has had over 70 reports of potential SLAPPs and, to date, has referred two matters to the SDT.

New practice notes and guidance

SRA guidance

In addition to the warning notices referred to above, since our last update the SRA has published the following updated guidance:

- Transparency in price and service [SRA | Transparency in price and service | Solicitors Regulation Authority](#)

Law Society practice notes

The Law Society has published two new practice note since our last update:

- File closure management: [File closure management | The Law Society](#)

- Consumer Protection regulations in conveyancing: [Consumer Protection Regulations in conveyancing | The Law Society](#)

Disciplinary and regulatory decisions:

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

Notable decisions include:

Solicitor who coerced vulnerable client into sending explicit images struck off by SDT

A solicitor was struck off for manipulating a client for whom he was acting in divorce proceedings, into sending explicit images, saying they were required for legal reasons to support a non-molestation order application. The SDT made a finding of dishonesty and said his conduct was 'clearly inappropriate.' He was also ordered to pay costs of over £32,000.

Solicitor struck off for taking client's money

In an agreed outcome, a solicitor who had been convicted of fraud and sentenced to 18 months in prison, having made 39 withdrawals totalling £7,850 from a client's bank account over a four-year period while acting under an LPA, has been struck off by the SDT.

Solicitor rebuked for breach of client confidentiality

A solicitor was rebuked and ordered to pay costs of £300 in accordance with a regulatory settlement agreement. He failed to attend a reinstated hearing relating to a child arrangement order, having not applied to come off record or adjourn, and later sent a copy of a privileged email regarding non-payment of fees, issues regarding appointment attendance and preparing the case to the opposing solicitors without the client's consent.

Paralegal banned for discontinuing claim without instructions

A paralegal who filed a notice of discontinuance without the client's

consent and then lied to the client and her employer has been disqualified from working in the profession.

Firm fined for failure to notify SRA of material change

A firm has been ordered to pay a fixed financial penalty of £750 and £150 costs for failing to promptly notify the SRA of a material change to the information it had previously provided to the SRA about its COFA and not remedying the breach after being given notice and reasonable time to rectify the breach.

Firm fined for failure to maintain accurate and compliant books of accounts

Under a regulatory settlement agreement a firm has been fined £7,658 and £600 costs for breaches of the SRA Accounts Rules, including a shortfall on client account, not completing client account reconciliations and failure to submit two years accountants reports on time, submitting them both together, 13 months and one month late, both of which were qualified.

Office manager banned from working in regulated firm without SRA permission

An experienced office manager has been made subject to a section 43 order, preventing her from working for a regulated firm without SRA permission. The manager transferred nearly £180,000 from client to office account on two matters to pay office expenses, including salaries and loans. She accepted her actions were dishonest and expressed remorse, stating that she was trying to stop the firm failing.

How Compli can help...

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

Andrea Cohen
Compli,
Weightmans LLP

Revamped range of support for solicitors through The Solicitors' Charity

THE SOLICITORS' CHARITY
Supporting you, since 1858

Wellbeing support for solicitors and their dependents in England and Wales

The range of support available for solicitors in England and Wales through The Solicitors' Charity has shifted. With a renewed focus on holistic wellbeing, the charity has refreshed its approach to support, and offers more types of help than ever for solicitors. It's time to take a fresh look at The Solicitors' Charity and its comprehensive support for emotional, financial, professional, and physical wellbeing.

Nick Gallagher, CEO of The Solicitors' Charity shared: *"You may not have thought of 'wellbeing support' and 'The Solicitors' Charity' in the same breath. However, things have changed, and it may be that we can help (if not now, but at some time in the future) with some of the wellbeing challenges that you or colleagues may be experiencing".*

"People's situations are all different and we have a wide range of clients approaching us for help because of a huge variety of challenges that they face. This could include struggling with the cost of living and money management, debt, ill health, disability, distress through domestic violence, and anxiety, which may be caused by work-related stress or life-related trauma".

The Solicitors' Charity offers assistance with various aspects of wellbeing, using its wellbeing pillars (as shown below).

- **Emotional**

Through established partnerships with providers in the field of psychotherapy, the charity can offer an initial assessment followed by sessions with a qualified therapist, where these are indicated. The Solicitors' Charity also part-funds the

mental health and wellbeing charity, LawCare, which is staffed with fully trained volunteers including many lawyers, providing a phone and email peer support helpline

- **Financial**

If individuals are struggling with finances and money management, The Solicitors' Charity has services in place which can help with budgeting and drawing up a practical money management plan. If the situation is more serious, Breathing Spaces and Debt Relief Orders can be negotiated.

However, we know how threatening dealing with debt can be, as a solicitor, and the charity can sometimes help to clear these. The Solicitors' Charity can also make direct financial awards for day-to-day support to individuals experiencing challenging times for solicitors who qualify for its financial eligibility criteria.

- **Professional**

Some solicitors may be returning to work after a break or may need to change the sector of law that they practice in, or even to move on from the law. Perhaps they have been made redundant and need support with securing their next career opportunity. Once again, The Solicitors' Charity funds sessions offering vital career transition counselling support. The charity has also helped with the cost of Practising Certificates for those with the chance of a job but no current income, and even with awards for work and interview clothes.

- **Physical**

Solicitors of any age can experience physical illness or disabilities which affect their ability to work or manage at

home. The Solicitors' Charity can provide occupational health assessments designed to identify adaptations that may help. The charity has also funded specialist equipment, where this is not available through the NHS.

The Solicitors' Charity offers a wide range of support services to solicitors, former solicitors, and their dependants in England and Wales. The majority of the wellbeing support offered does not require any financial eligibility checks, just proof of current or previous registration with the SRA.

All dealings with The Solicitors' Charity are strictly confidential; the charity is independent, and support is provided discretely, non-judgementally and in confidence.

Unclaimed client balances can help to fund services

If you are (or your firm is) looking for a meaningful way of giving back and making an impact on the profession, consider donating unclaimed client balances (RCBs) to The Solicitors' Charity. It's a simple action, but it goes a long way. Not only does it assist law firms in meeting their regulatory obligations, but it also provides a crucial stream of funding for the continued provision of wellbeing packages for solicitors and their families. The Solicitors' Charity indemnifies all donations of this kind, so should you ever need any unclaimed balances back, you can claim the funds back at any time.

Any voluntary donations are also welcome from individuals, firms, and local Law Societies.



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Charity Spotlight: Wirral Hospice St John's



Wirral Hospice St John's is Full of Life

Wirral Hospice St John's has been delivering compassionate care and enabling support for people with complex life-limiting conditions for more than forty years now.

Inspired by the acclaimed founder of the modern hospice movement, **Dame Cicely Saunders**, the hospice's founding group spent a number of years, from the mid 1970's, planning, engaging volunteers and supporters to fundraise and, when everything was in place, recruited an experienced and motivated team of nurses, doctors and other allied health professionals to be in a strong position for its official opening on 24th June, 1983.



Opening Day

In those days everything was built on providing a haven where people with, predominantly, cancer, could be given the most benevolent care and support to live out their final days as comfortably and pain-free as possible.

Nowadays, services are massively expanded so that people with a whole range of life-limiting conditions, including cancer, COPD, motor neurone disease, heart, liver and kidney diseases and more, can access hospice support.

As well as growing to support people with a wider range of illnesses, the hospice has also evolved from its core offerings; it's 16-bed Inpatients ward, Outpatients clinics and Wellbeing Centre (day services) at Clatterbridge Health Park, to also deliver its specialist care and support with home visits all around Wirral through its *Hospice at Home service*.

Doctors, nurses and healthcare assistants are the kind of professionals people associate with hospice care, but that is underpinned by an essential team of allied health professionals, and others, in a *Patient and Family Services team*.

Help with fatigue, anxiety and breathlessness, physiotherapy, occupational therapy, complementary therapy, spiritual support, benefits and social work, is all fitted to the needs of patients, while counselling and support pre- and post-bereavement is available for patients and their loved ones as appropriate.

In the last couple of years, a young person and children's practitioner has also become integral to the team as more than 10% of patients are under 50 years of age (around 50% are under 69) and they often have teenage or younger children.



Hospice at Home

Wirral Hospice St John's Hospice at Home team delivers two separate areas of support;

- **Home support visits** aim to complement care already being provided by family members and other carers and reassures people that their loved ones are in safe hands. These are 3-hour day or full overnight visits to allow loved ones to get a little time for everyday tasks or for a good night's rest, provided by Wirral Hospice in partnership with Marie Curie and are available 365 days a year.
- **Home personal care visits** support patients who are usually in the last few weeks of their life and may want to stay at home or to get home from hospital. Personal care, meal preparation, nutrition, continence care while also monitoring any other health conditions, concerns or changes are all part of this element of Hospice at Home with visits normally between 30 and 60 minutes long.

As full a life as possible

Wirral Hospice St John's works on the absolute premise that a life-limiting diagnosis should not limit, as far as is

practically possible, a person's quality of life.

Ill people are still people. Patients like to laugh and can still enjoy life.

Witness any day in the hospice Wellbeing Centre where patients come once a week for half a day to access support for living well with their illnesses while they're at home and between therapies and advice they'll be taking part in quizzes, crafting, baking, play your cards right, listening to music and telling stories. Everyone is laughing, chatting and putting the world to rights.

They love it so much they demanded the hospice set up extra *check-in-and-chat* and coffee mornings so they can meet with their new friends, fellow patients, and stay close to the hospice.

The initial thoughts they may have had when being referred to the hospice is completely dispelled. As one patient reported,

"You have given me my life back. I am too busy living to think about dying, it will happen when it happens but when it does I know you will be there to support me."

At the right time, the gentle dignity and utmost respect that people deserve in their final moments is something the hospice does very sensitively. Literally thousands of people are testament to this, reflected in their kind donations throughout the year and at the hospice's annual celebration of lives passed, *Light up a Life*.

Ten thousand lights, sponsored in memory of loved ones, shine from the trees around the hospice in the run up to and throughout Christmas time. It's a poignant commemoration whether its for people who died under hospice care or in other places.

Fundraising and Volunteering

All hospice services are completely free of charge to everyone who uses them. This is due, in large part, to the continued generosity of the people of Wirral, and from further afield, individuals and



organisations, who make their massive contributions.

This might be through various fundraising activities and events, other donations through regular giving, charitable trusts, leaving gifts in wills, joining the weekly lottery, donating pre-loved items to, and shopping from, ten (soon to be eleven) charity shops and/or those who give hours of their precious time through volunteering.

How can members of Liverpool Law Society help?

You may live, be based as a business, or have family, colleagues or clients who live in Wirral and may have experienced hospice services.

Of course, runs, walks and other challenges (Skydive or WingWalk anyone?) can be facilitated and the

hospice would love to hear from you.

Maybe, pick Wirral Hospice St John's as your organisation's charity of the year, as *Maxwell Hodge* did in 2023, and they'll work with you on getting all of your stakeholders involved.

Or maybe you could, alongside a host of other partner solicitors, become part of the hospice's *Make A Will Month* each April where you waive charges for people making a simple will (for the client to make a kind donation, at about half of the normal fee, to the hospice).



In all, or any cases please email fundraising@wirralhospice.org to arrange a meeting and also visit www.wirralhospice.org for more information about all that the hospice does.



Ten Thousand Lights

Forthcoming Courses

DATE	TOPIC	SPEAKER
11/09/2024	PRIVATE CHILD LAW CONFERENCE	Various
13/09/2024	Writing for the Press and the Net	John Trimpos
17/09/2024	RegTech, SupTech and LegalTech	Alan Wilkinson
18/09/2024	RESIDENTIAL PROPERTY CONFERENCE	Various
20/09/2024	Private Child Law Update	Safda Mahmood
20/09/2024	Public Child Law Update	Safda Mahmood
24/09/2024	Introduction to Consumer Credit Act	Alan Wilkinson
25/09/2024	FAMILY FINANCE CONFERENCE	Various
27/09/2024	Diversity - Managing Across Cultures	John Trimpos
01/10/2024	Conveyancing; Recent Statutory Changes	Richard Snape
02/10/2024	EMPLOYMENT LAW CONFERENCE	Various
04/10/2024	Is it enforceable? - Making Agreements Stick	Chris Beanland
08/10/2024	SRA Accounts Rules Update	Linda Lambert
09/10/2024	CLINICAL NEGLIGENCE CONFERENCE	Various
11/10/2024	Commerical Property: Essential Update 2024	Hannah MacKinlay
15/10/2024	Personal Branding for Black Lawyers	Jannette Brimm
18/10/2024	A Tricky Business: BPR and APR Explained	Rebecca Roscoe
22/10/2024	Making applications in the Court of protection, including Urgent or interim applications	Helen Forster

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: [Training | Liverpool Law Society](#)



2024 Private Child Law Conference

Wednesday 11th September, 9.30am - 3.15pm

Venue: (hybrid) Online or in person

Private Law Local Initiatives

DJ O'Neill & Gemma Baker, Assistant Service Manager,
CAFCASS

Internal relocation within the UK: When moving on means moving away

Kirsty Leedam, Weightmans

Communicating Safely & Securely Online

Katie Deans, OurFamilyWizard

The Lundy Model of Child Participation and Direct Child Consultation

Helen Pittard, 174 Law

Domestic Abuse in Private Children Proceedings

Margaret Parr, 7 Harrington St Chambers

The Top 10 Cases of the last 12 months: things to note

Tom Hynes, Oriel Chambers

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FOR MORE INFORMATION OR TO BOOK, CLICK HERE



Writing for the Press and the Net

with John Trimbo

'Live' on Friday 13th September, 10am - 1pm

This online session will provide delegates with best practice guidance on writing articles, blogs & anything else in the public domain.

Content:

- How to use the "pyramid writing" technique to create impact
- Avoiding clichés
- Using succinct, punchy language
- Using the optimum structure
- The Fog Index
- Use of graphics and page layout
- Practical exercises

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



NEW RegTech, SupTech & LegalTech

with Alan Wilkinson

'Live' online on Tuesday 17th September, 12pm - 2pm

The entire world is changing with technology. Regardless of our reactions to technology it is here to stay. Technology that fuses with specific industries has spawned a variety of hybrids like RegTech, SupTech and LegalTech.

To enable us to service our clients we need to ensure that we understand the developments in technology and the associated regulatory issues.

Issues that will be covered include:

- An explanation of and introduction to RegTech, SupTech and LegalTech
- The benefits and challenges of RegTech, SupTech and LegalTech solutions

& more...

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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RESIDENTIAL PROPERTY CONFERENCE 2024

WEDNESDAY 18TH SEPTEMBER | 9.30AM - 3PM
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THIS CONFERENCE IS PACKED WITH INSIGHT AND DISCUSSION COVERING THE LATEST TECHNICAL DEVELOPMENTS & BEST PRACTICE

Chairperson

Laura Cartwright, Bell Lamb Joynson

Current Contentious Conveyancing Issues

Siobhan Beattie, DTM Legal

The latest updates from HM Land Registry

Keith Lloyd & Pam White, HM Land Registry

Digital Solutions for Digital Conveyancing Journeys

Lisa Edwards, InfoTrack

Building an authentic team culture - how to strike the right balance for the company and it's employees

Natalie Moore, AConveyancing

Climate Change 2024 & beyond

Luke Parsons, Landmark Information

The Renters Reform Bill - Behind the Headlines

Chris Hall, Dutton Gregory

What do I care about law? Ain't I got the power?" - Buying & Selling Property using an LPA or Deputy

John Jones, Jackson Lees Solicitors

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Book Here





Autumn Private Child Law Update with Safda Mahmood

Live online: Friday 20th September, 10.30am - 1pm

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 TO BOOK](#)



Public Child Law Update with Safda Mahmood

Live online: Friday 20th September, 1.30pm - 4.30pm

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, and 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

[BOOK HERE](#)



***NEW* Introduction to Consumer Credit Act** with Alan Wilkinson

Tuesday 24th September, 12pm - 2pm

This online course will provide an introduction to the consumer credit regime including key provisions under the Consumer Credit Act 1974 for regulated consumer credit and hire agreements. It will also provide an update on recent developments in this area.

The areas covered will include:

- The scope of the CCA
- Determining when an agreement will be regulated by the CCA
- The approach to regulation
- Essentials of regulated credit and hire agreements
- Unfair relationship provisions: What is unfairness?
- Extortionate credit bargains and the need for reform
- S.140: The new test; Extent and exclusions
- How the unfair relationship provisions operate in practice
- Burden of proof
- Limitation
- Overview of recent case law
- Proposals for change

[BOOK HERE](#)



****Save the date****

Wednesday 25th September 2024
for the

Family Finance Conference

Hybrid event—attend in-person or online

To be chaired by District Judge Shereen Guirguis
& with speakers confirmed so far;
Alexis Campbell KC, Naomh Gallagher,
Charles Hale KC, Tom Hynes & Max Lewis

[FOR MORE INFO, CLICK HERE](#)

Diversity – Managing Across Cultures

with John Trimbo

'Live' on Friday 27th September, 10am - 1pm

This online course will teach delegates the seven building blocks of culture so that they can more effectively interact with people from other cultures.

Covering:

- Benefits of diversity in the workplace
- What constitutes culture?
- Detecting others' cultural norms
- Flexing to accommodate others' cultural orientations
- Group discussion – doing business in other countries, especially Switzerland and the Middle East
- Action planning

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Mental health allies: champions for a supportive legal sector

In today's fast-paced and high-pressure legal sector, the role of a mental health ally has never been more crucial. Whether you're in a leadership position or just starting your career, embracing your role as a mental health ally can make a significant difference to your colleagues, your workplace and the legal sector more widely.

What is a mental health ally?

An ally is someone who actively learns more about, supports and advocates for colleagues who belong to marginalised or underrepresented groups. Allies stand up against stigma, promote diversity and inclusion, and push for culture change.

As a mental health ally, you will be helping your colleagues and contributing to a healthier, more supportive, and ultimately more effective legal sector. Put simply, it's about everyone creating a space where people and organisations can thrive.

Who can be a mental health ally?

Anyone can be a mental health ally, and it often only takes one person to transform the culture of a business. Partners, supervisors, and other respected colleagues can lead by example by sharing their own experiences, which can empower all members of the team. However, we often hear that it's those in managerial roles who are most reluctant to challenge the status quo. When it comes to calling out inappropriate practices at work, there's often a culture of 'not making a fuss', which only serves to normalise the behaviour.

Turning to more junior team members, it has been suggested that Generation Z (those born between 1995 and 2009) are most open to talking about mental health and are not prepared to put up with environments where they don't feel supported. Given this generation is expected to account for [27% of the global workforce by 2025](#), their status as allies should not be underestimated. By not listening to these concerns, organisations risk failing to attract and retain the best talent, losing people to competitors or from the legal sector altogether.

So really it falls on everyone in the legal sector, whatever your role, to create a psychologically safe working environment. Inspired by the words of Greta Thunberg, no one is too small (or too big) to make a difference.

Why be a mental health ally?

The legal sector desperately needs mental

health allies because of the pressures and challenges faced by people working in this field. The legal sector is known for its high-stress environment, including long working hours, the competitive nature of the work, and the emotional toll of handling complex, often distressing cases. Here are a few reasons you should be a mental health ally:

1. Mental health still carries a significant stigma, and many people don't feel able to be open and honest at work. Being a mental health ally helps to break down these barriers, encourage open discussions about mental health and promote a culture where seeking help is viewed as a sign of strength, not weakness.
2. People often feel isolated with their mental health struggles due to the fear of being perceived as incapable or unprofessional. As an ally, you can provide essential support to your colleagues by offering a listening ear, understanding, and creating a supportive community within the workplace.
3. An environment that values mental health is inherently more inclusive. Effective allyship helps to attract and retain a broader spectrum of talent and creates a more diverse and inclusive legal sector where all members have the opportunity to succeed.
4. Being a mental health ally also offers opportunities for your own personal growth. It fosters empathy, improves communication skills, and enhances your understanding of mental health.
5. On a larger scale, being a mental health ally in the legal sector can significantly enhance productivity, engagement, and job satisfaction. By advocating for change, you can influence policy reforms and foster a deeper understanding of mental health across the legal community.

On LawCare's helpline, we often hear stories of how allies are having a positive impact on workplace culture. For example, inappropriate comments are often brushed off as 'banter', particularly in a social context. Allies challenge discriminatory and unacceptable behaviour, and this can be really powerful when a leader sets that example.

LawCare can support callers who are worried about someone else, be that a colleague you work closely with, a family member or another member of staff. It can feel difficult talking to someone you are concerned about, and you

may feel anxious about starting a conversation with them. But taking just a few minutes to talk could make a real difference to that person. You don't have to be a lawyer to contact LawCare for support. Organisations couldn't function without an effective and healthy business operations team, so whether you work in HR or IT, as a secretary, on reception or in business services, you are part of the UK legal sector, and we are here for you too.

Start by making small changes

You don't have to have it all figured out from the outset. Allies can start by making small changes, which all add up to make a big difference:

1. Better understand mental health by listening and learning. Take the time to listen to the experiences, challenges, and needs of people who have struggled with their mental health. You could also educate yourself about different mental health conditions, their symptoms, and the various challenges that colleagues might be facing. Mental Health First Aid training can be a good place to start.
2. Regularly check in on colleagues. A simple text or call can make a significant impact.
3. Use your voice to challenge discriminatory remarks, behaviours, and policies at work and in your personal life, even when it's uncomfortable. This is crucial for those in leadership positions, who are best placed to set an example.
4. Use your position to advocate for policies and practices that promote diversity and inclusion.
5. Continuously reflect on your actions and attitudes, accept feedback, and be willing to change and grow.

In conclusion, we urgently need more mental health allies within the legal sector. Whether leading by example, offering a listening ear, or championing a change of policy at work, every action taken contributes to a healthier, more vibrant legal community. Being an ally is an ongoing process of learning, listening, acting and reflecting. It requires a commitment to challenge injustices and contribute to a world where everyone feels valued and included.

You can contact LawCare for support on 0800 279 6888, support@lawcare.org.uk or by visiting [LawCare's website](#) to use the live online chat. LawCare's website also has lots of information (articles, stories, videos, blog and podcasts) on mental health and wellbeing.

Private Client Conference 2024

On 15th May I attended the Private Client Conference. As a Solicitor in a small firm I chose to attend in person, as I always find it beneficial to meet other professionals in your field and was glad I did as I got to enjoy the fabulous setting of Taylor Wessing's office at the Edward Pavilion at the Albert Dock.

The first speaker of the day was **Peter Edwards**, of Peter Edwards Law, who joined remotely and provided some very practical guidance on not only dealing with those who (may) lack capacity but also their families and how to ensure best interests are being prioritised, whilst also managing the red tape regulatory requirements. Peter's wealth of experience is fascinating.

Next we heard from **Sophie Hurst**, a specialist Court of Protection Barrister from Kings Chambers. Sophie provided an engaging update regarding the Court of Protection, including some procedural changes and tips on what to include in applications in order to avoid potential queries from the Court and avoid yet further delays. Sophie's presentation also encompassed the key areas of Best Interests and Capacity, which tied in nicely with Peter's presentation. I will certainly be keeping her details to hand for any contentious matters.

After a short break, **Emma Chamberlain** of Pump Court Tax Chambers provided a remote tax update and a post budget review, covering Inheritance Tax, Agricultural and Business Property Relief and what seemed to be a key one – a new Non-Domicile regime. This led well into the theme of anticipating Inheritance Tax and Capital Gains Tax post-election, which was covered in depth by **Michael Sherry** of Complete Counsel.

We then broke for lunch and enjoyed sandwiches, fruit and cookies, which I enjoyed whilst admiring the view of the docks on a glorious sunny day- which until I wrote this, I forget we had actually had any sun this year!

Ian Bond from Irwin Mitchell then gave a very insightful update on some legislative changes and key case law. These included the Statutory Legacies for intestacies, gender recognition and the removal of the special measure which had allowed Wills to be witnessed via video, which had been introduced during Covid times. The new STEP provisions were also discussed and it was interesting to see the mix within the room of who used the old second edition provisions, the current third edition ones, their firm's own, or a combination.

Louise Scholes, of Brabners then completed the day with a Lasting Power of Attorney update. Louise discussed the latest Law Society practice note (2023), which may prove useful to practitioners and the importance of a suitable Certificate Provider, as per the case of *TA v Public Guardian* (2023).

KIN Probate sponsored the event and amongst their goodies was a pencil with seeds in the tip, which can be planted once finished, to become flowers. I am glad to say I wasn't the only person who got (worryingly) excited by this! Many thanks to KIN and all the speakers.

Emily Pullan TEP
Solicitor, Blain Boland & Co



James Gartland, Managing Director of Kin Probate

Solicitors' Professional Indemnity renewal: insights from an underwriter

According to [Law Society surveys](#), professional indemnity insurance (PII) is one of the most significant outlays for a law firm.

As PII is compulsory it is not surprising that at times it can feel like a frustrating purchase. So what are underwriters looking for and how can you find an insurer that suits you?

The danger of optimism bias

[Optimism bias](#), the tendency to overestimate the likelihood of experiencing positive events and underestimate negative ones is a challenging mindset when it comes to managing risk. The reality is that claims against law firms do happen. At HDI, we have insured hundreds of firms on a primary basis for over 15 years. In this time, we have seen many examples of claims and allegations brought against law firms. The financial, emotional and reputational toll can be huge.

Law firms are operating in a rapidly changing world, and it feels as though the pace of change is increasing. At HDI we believe in preparation rather than in prediction, and we insure firms whose values align with this business philosophy. We can't always see what is coming, so building resilience within the firm is key to navigating what might come next.

At HDI, what are we looking for?

As your insurer, we are there for you when the worst happens. However, insurance is just one tool in your armoury against risk. We look for firms that invest in a clear and robust risk management strategy. We want to hear about how you identify and manage risk in your firm, which can include risk management planning, business continuity plans,

file review policies, supervision policies and external audits.

When reviewing a firm's proposal form, I like to pay particular attention to the answers that help to give me an insight into the culture of the firm. Your submission can be really enhanced for example, by sharing the history of your firm, any particular specialisms, your future goals, the type of work you like to do and the type of work that you would turn away. These things allow us to take a more holistic view of your firm, beyond the rating data that is captured in a proposal form.

Getting your submission in early and in full order is vital. Work with your broker to ensure you have up to date claims summaries. It is also really helpful to include a narrative around any open and closed claims. Things like, what the allegation was and what lessons have been learned. The fact that you may have experienced a claim is not always an issue – at HDI we recognise that there is often a story and we are open minded and willing to listen.

What is on the horizon?

We are seeing an increase in the frequency of high value claims. The reasons for this include, rising asset values, more complex transactions and defence cost inflation. Worryingly the market has begun to see claims exceeding the compulsory primary limit. Firms should have heightened risk management measures in place when taking on matters of high value, or when acting for clients of considerable net worth.

Conveyancing remains the main source of claims, both from a frequency and an overall cost. In addition, there is a notable jump in

claims from wills, trust and probate work. The drivers for this are a combination of more complex family structures, increases in overall estate values and the challenges that can arise with people living longer. Our advice is that this would be a good time to conduct a review of policies and procedures and implement targeted refresher training for staff.

Looking further into the future, insurers will be considering the impacts of the economic and political environment as drivers for claims, the impact of AI, the continued threat from both cyber and fraud. At HDI we believe that we have the strength and stability to support our insureds now and for the long-term.

If you are a firm with a turnover of under £20m and would like to obtain a quotation from HDI please contact Lockton Insurance Brokers.

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Legal Tech Adoption: A Football Team Strategy

As the excitement of Euro 2024 grips Germany and football fever sweeps across Europe, we at Denovo couldn't help but draw parallels between preparing a football team for a major tournament and the strategic adoption of new technology in a law firm. Just like a well-oiled football team needs careful planning, dedicated training, and seamless execution to triumph on the big stage, integrating new legal tech into your practice demands a similar approach. Let's break down how you can tackle this challenge head-on, football style.

Team Formation: Identifying Key Players

1. **Management** (Coach and Manager):
 - **Role:** Strategise, plan, and oversee the adoption process.
 - **Responsibility:** Ensure the legal tech aligns with the firm's goals, manage the budget, and monitor progress.
 - **Key Players:** CIO, CTO, Managing Partners.
2. **IT Department** (Defensive Line):
 - **Role:** Protect and maintain the technical infrastructure.
 - **Responsibility:** Ensure data security, integrate new systems, and troubleshoot.
 - **Key Players:** IT Managers, Cybersecurity Experts, Network Engineers.
3. **Legal Team** (Midfielders):
 - **Role:** Connect the technical and operational aspects, ensuring smooth adoption.
 - **Responsibility:** Train staff, provide feedback on tools, and ensure compliance.
 - **Key Players:** Senior Lawyers, Associates, Paralegals.
4. **Support Staff** (Forwards):
 - **Role:** Directly interact with the new tech, driving its practical application.
 - **Responsibility:** Daily usage, reporting issues, and suggesting improvements.
 - **Key Players:** Paralegals, Administrative Staff, Junior Associates.
5. **Vendors/Consultants** (Substitutes and External Coaches):
 - **Role:** Provide external expertise and support.
 - **Responsibility:** Implement, customise, and offer ongoing support.
 - **Key Players:** Tech Vendors, Consultants, Trainers.

Pre-Season Training: Preparation and Planning

1. Scouting and Selection:

- **Identify Needs:** Conduct a comprehensive needs assessment to understand specific challenges and opportunities.
 - **Research Solutions:** Scout for the best legal tech solutions that fit the identified needs.
 - **Pilot Programs:** Run pilot programs with selected tools to evaluate effectiveness and user-friendliness.
- ### 2. Formation Strategy:
- **Integration Plan:** Develop a detailed plan for integrating new tools with existing systems.
 - **Budget Allocation:** Ensure proper budget allocation for purchase, implementation, and training.
 - **Timeline:** Set realistic timelines for each phase of adoption.

Training Camp: Education and Onboarding

1. **Kick-off Meeting:**
 - **Goals:** Communicate the objectives and benefits of the new technology to the entire team.
 - **Roles:** Clarify individual roles and responsibilities in the adoption process.
2. **Training Sessions:**
 - **Workshops:** Conduct hands-on workshops for different user groups.
 - **Webinars:** Organise webinars for continuous learning and addressing common queries.
 - **Documentation:** Provide comprehensive guides and FAQs.

Game Day: Implementation and Execution

1. **Initial Deployment:**
 - **Soft Launch:** Start with a soft launch to a smaller group to ensure the system is running smoothly.
 - **Feedback Loop:** Establish a feedback mechanism to gather user input and address issues promptly.
2. **Full Rollout:**
 - **Monitoring:** Continuously monitor system performance and user satisfaction.
 - **Support:** Ensure robust support is available, including a helpdesk and on-site assistance.

Post-Game Analysis: Review and Improvement

1. **Performance Metrics:**
 - **KPIs:** Define key performance indicators (e.g., efficiency gains, error reduction, user satisfaction).
 - **Data Analysis:** Regularly analyse usage

data and performance metrics to measure success.

2. Continuous Improvement:

- **Feedback Integration:** Incorporate user feedback for ongoing improvements.
- **Updates and Upgrades:** Keep the technology updated with the latest features and security patches.
- **Training Refreshers:** Conduct periodic training sessions to keep everyone up to date with new functionalities.

Victory Lap: Celebrating Success

1. Acknowledge Contributions:

- **Recognition:** Recognise and reward the efforts of key contributors.
- **Success Stories:** Share success stories and case studies within the firm to encourage continued adoption.

2. Future Roadmap:

- **Long-Term Goals:** Set long-term goals for further tech enhancements.
- **Innovation:** Foster a culture of innovation and continuous improvement.

By adopting a structured and strategic approach like a football team, law firms can effectively integrate legal tech into their practice. This ensures all team members are aligned, trained, and motivated to achieve a common goal: enhanced efficiency, accuracy, and client satisfaction.

Just as a football team meticulously prepares for every match, a law firm must diligently plan and execute its legal tech adoption strategy to score big in today's digital age. And remember, as **Bill Shankly** put it, *"At a football club, there is a holy trinity - the players, the manager, and the supporters - directors don't come into it. They are only there to sign the cheques."*

In the context of a law firm, this means that while the directors make the final decisions, the success of new technology adoption hinges on the core team – the defensive line, midfielders and forwards – buying in. The feedback on the challenges faced, the workflow desired, and the suggestions for efficiency improvements from the team members who are directly interacting with the new tech are key to decision-making and ultimately a successful implementation.

If you're ready to get out there and win with new legal technology, reach out to us by visiting denovobi.com, email info@denovobi.com or you can call us on 0141 331 5290.

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