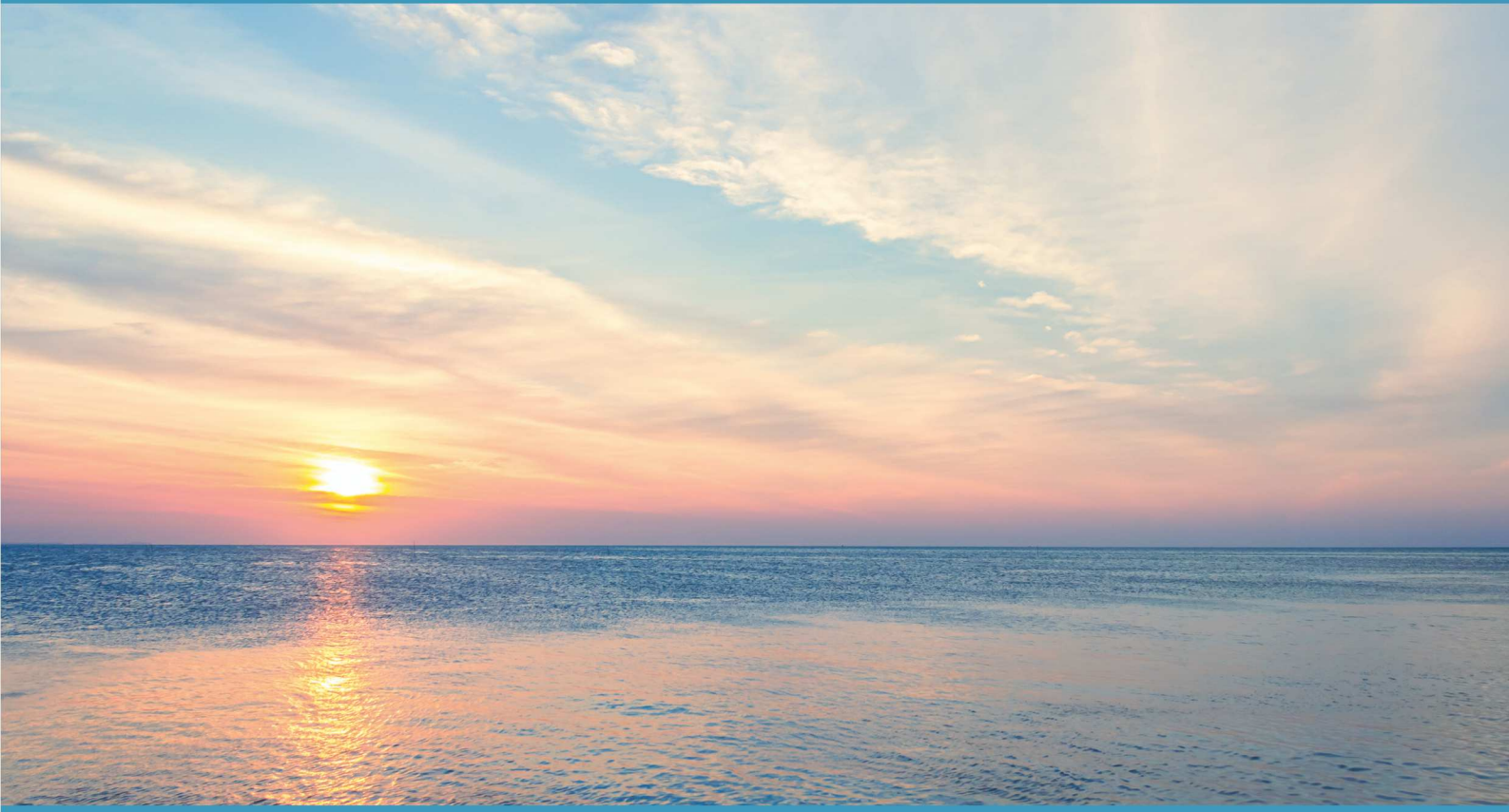


TEN OLD SQUARE
CHANCERY AND COMMERCIAL BARRISTERS



NEW HORIZONS

LONDON TRUSTS CONFERENCE 2023

THURSDAY 14 SEPTEMBER, 13:00 | £215

BMA House, Tavistock Square, London WC1H 9JP

Join **Ten Old Square** and guests for an afternoon of debate and discussion around the most recent developments in trusts, both onshore and offshore. Topics will include proper purposes, protector powers, mistake, and disclosure against trustees.

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THE LONDON TRUSTS CONFERENCE 2023

PROGRAMME

Thursday 14 September 2023

13:00

Registration and Lunch

14:00

Welcome

Simon Taube KC

14:05

Proper Purposes

James MacDougald

14:30

Panel Discussion

Led by Simon Taube KC

Susannah Meadway and James Poole with guest speakers, Kirstie McGuigan (Taylor Wessing) and Robert Gardner (Bedell Cristin)

An interactive session which gives delegates the opportunity to consider and discuss issues arising from applications to set aside trusts on the grounds of mistake including:

- What amounts to a mistake
- What happens if the settlor was aware of the risk of adverse tax consequences
- Claims for professional negligence
- Issues of limitation
- Privacy and anonymity

16:00

Coffee Break

16:20 — 17:00

Debate: Protectors' powers and the nature of the review

Georgia Bedworth and Richard Dew go head to head, debating the question of the nature of the review to be carried out by protectors

17:00 — 17:30

Third party disclosure against trustees

Thomas James and guest speaker, Maryam Oghanna (Forsters)

17:30 — 18:00

BlockTrusts

A reprise of the gameshow made especially for trusts!

18:00

Drinks and canapés

BOOKING INFORMATION

The price for this event is £215 per delegate

Please [CLICK HERE](#) to reserve your tickets.

CONTACT DETAILS | emilyoverett@tenoldsquare.com | +44 (0)207 405 0758

Please feel free to share details of this event with colleagues who may also wish to attend.



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SPEAKER PROFILES

SIMON TAUBE KC

Simon is Head of Chambers and his practice covers the broad range of Chancery activities in both litigation and advisory work. He also conducts cases abroad in other common law jurisdictions. He is regarded as "the brightest of his generation" and a "Star Individual" in Chambers UK. His special expertise includes the fields of UK and foreign trusts and estates, capital tax planning and trust taxation, and fiduciary duties generally. He also has wide experience in charity, property, securities, partnership, professional negligence and family provision matters. He is ranked a Star Individual in Chancery: Traditional, and is in Band 1 for Trusts and Offshore in Chambers UK 2022. Simon is also ranked in Tier 1 (Leading Silks) in Charities and Private Client: Trusts & Probate and in Tier 2 (Leading Silks) in Offshore in Legal 500 2021; and he is also ranked as a Star Individual for Chancery: Traditional for Chambers UK HNW 2021.



SUSANNAH MEADWAY

Susannah is a prominent junior within the private client arena, acting in difficult, complex and high-value matters. She is ranked at the highest level in the current legal directories and is regarded as a leading expert on the variation of trusts. Her well established practice encompasses all types of advisory, drafting and litigation work in the fields of trusts and associated taxation, wills, probate and the administration of estates, and charities. Susannah is ranked in Band 1 for both Chancery: Traditional and Trusts in Chambers UK 2022.



EVAN PRICE

Evan's extensive cross-practice knowledge has him uniquely placed to advise on matters which require a strong command of all aspects of Chancery law. He is regularly instructed to resolve matters involving broad and knotty issues that require urgent assistance. His practice and expertise includes litigation involving trusts and estates, property and insolvency law. He also advises families in relation to non-contentious probate matters and capital taxes. Evan has recent experience of dealing with sensitive cases where publicity may become a problem. He has recent experience of cases where claims are made pursuant to the 1975 Act as well as all manner of claims about estates, including where there are claims of fraud. He has advised trustees of charities about restructuring their funds and organisation and in relation to disputes between directors of a charity about decisions taken by them. He has recently made a 'Re Yorke' application in respect of the estate of a former name at Lloyds. Evan is a member of STEP.





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RICHARD DEW

Richard's practice is focused on Wills, Estates and Trusts and related professional negligence. His practice is predominantly litigation, and he is frequently involved in large and complex claims. He also advises and represents in Court of Protection matters and provides expert advice in respect of tax and tax planning (principally capital taxation). He is a member of STEP and ACTAPS, and is on the committee of the STEP Contentious Trusts and Estates SIG and of the Chancery Bar Association. He was nominated for Chambers and Partner's Barrister of the Year (Chancery) 2017 and was ACTAPS' Contentious Barrister of the Year for 2016. Richard is an editor of Rossdale's Probate and Administration of Estates and Parker's Modern Will Precedents and regularly writes and lectures on chancery and private client matters. Richard was shortlisted by Chambers UK for the (Chancery) 'Junior of the Year' award 2021.



GEORGIA BEDWORTH

Georgia is described in Chambers UK 2018 as "one of the most phenomenally clever and sensible barristers you can come across; things just sort themselves out when she is on the case". Georgia has a thriving traditional chancery practice with particular focus on trusts and estates matters, both contentious and non-contentious. Georgia's strong real property background and expertise give her an edge when dealing with landed estates, as well as when advising on any trust matter with a property element. As well as having considerable experience and expertise in contentious chancery matters, Georgia also undertakes a considerable amount of non-contentious work, including capital taxes planning. She is an editor of Rossdale's Probate and Administration of Estates and the author of Atkins Court Forms: Probate and Family Provision.



JAMES MACDOUGALD

James has a general Chancery practice including litigation, advice and drafting in all of Chambers' core disciplines. He has particular experience of private client work and advises regularly on wills, trust and estate administration, capital taxation, Court of Protection matters, contentious trust and inheritance disputes and family provision claims. As a litigator, James appears in trust and estate disputes both as sole counsel and as part of a team. He also undertakes property, insolvency and general commercial litigation in the High Court and the County Court. While the majority of his cases are litigated in the English courts, he has also recently been instructed in trust disputes in Jersey, Guernsey, Bermuda and the Bahamas.





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JAMES EGAN

James has a busy trusts practice with a strong reputation for his advisory, drafting and litigation work in both contentious and non-contentious trusts and estates proceedings (including claims for the removal of trustees and personal representatives, as well as alleged breaches of duties). He also has a particular expertise in the similar field of disputes arising out of alleged misconduct by LPA Attorneys often focusing upon the personal and proprietary claims that might be brought to recover monies/assets allegedly misappropriated from the donor (both before and after the donor's death). His practice generally has an emphasis on cases with a real property angle with frequent instructions in TOLATA disputes, as well as any trusts or estates case with a real property element. That said, James is regularly instructed in all aspects of private client practice including contentious and non-contentious wills and probate disputes, 1975 Act claims, Court of Protection matters, real/personal property disputes, bankruptcy/insolvency, and general commercial disputes (as well as related professional negligence claims). Whilst James is most frequently instructed as sole counsel in matters before the High Courts, Court of Protection and County Courts, he equally enjoys working as part of a team (latterly, James was recently led by Rupert D'Cruz QC in *Harbour Fund III LP v Kazakhstan Kagazy PLC & Ors* [2021] EWHC 1128 in which they successfully defended Kazakhstan Kagazy JSC on all material issues in dispute).



JAMES POOLE

James has a largely contentious practice which focuses on trusts, estates, property and Court of Protection disputes. His inter-disciplinary expertise means that much of his work concerns disputes involving multiple areas of law. This is reflected in some of his recent reported decisions, which include: *Abdelnoor v Barker* [2022] EWHC 1468 (Ch), *Ware v Ware* [2021] WTLR725 and *Fantini v Scrutton* [2020] WTLR 1273. He is ranked by Chambers & Partners, Chambers HNW and Legal 500 – the latter for both Private Client: Trusts and Probate and Property Litigation – and has been nominated for the Star Junior Under 10 Years' Call at the Chambers HNW awards this July. The directories say that "James is a brilliant lawyer and an all-round great guy. He knows his stuff and is someone that can be relied on in any situation. I always feel better having him in my corner.... He approaches cases with good humour and is loved by clients". James is equally comfortable being instructed in both English and Bislama, and is also a qualified and experienced mediator.





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ADAM STEWART-WALLACE

Adam has a general Chancery and commercial practice, dealing with contentious wills, trust and estate matters, as well as partnership and property work.

He appears regularly in the high court and county court.



THOMAS ARNULL

Thomas has a wide and varied practice in both Traditional Chancery and the Court of Protection. He is regularly instructed in matters involving trusts, wills, estates and the various issues arising in connection with the taxation of these. He has acted in Court of Protection matters relating both to property and affairs and health and welfare. Tom is also experienced in commercial chancery, property (including landlord and tenant) and insolvency litigation. Tom joined Ten Old Square as a tenant in October 2020, having successfully completed pupillage with Chambers. Prior to his pupillage, Tom spent a year in America studying for an LL.M at Harvard Law School. Whilst there, he appeared as an advocate before the Massachusetts courts, and won the Federico Giuseppe Mancini Prize for his dissertation.



THOMAS JAMES

Thomas joined Chambers as a tenant in October 2021, following the successful completion of his pupillage. He sat with Jeremy Callman, Richard Dew, Georgia Bedworth, Naomi Winston and James MacDougald. During pupillage, Thomas gained experience in all of Chambers' core practice areas, including Private Client (both contentious and non-contentious); Property (including Landlord and Tenant); Court of Protection; Partnership and LLPs; Tax; and Commercial Chancery. He has been instructed in his own right and is equally happy acting as sole counsel or as part of a team. Thomas has a First Class degree in History from the University of Exeter. He was awarded Middle Temple's Diplock Scholarship for his legal training, going on to obtain a Distinction on the GDL and an Outstanding on the BPTC. He has also tutored extensively in trusts law. Before joining Chambers, Thomas worked in the Court of Appeal (Civil Division) as Judicial Assistant to the Rt. Hon. Lord Justice Patten.

