THE LONDON TRUSTS CONFERENCE
27 JUNE 2019 | 1.30PM
TRINITY HOUSE, TOWER HILL, LONDON EC3N 4DH | 4.5 CPD | £149

TRUSTS IN DIFFICULT TIMES

The London Trusts Conference is an established fixture in leading trust advisers' calendars. This year our highly regarded panel of legal experts will focus on a wide range of issues that can arise over the lifetime of trust, from the perspective of trustees, beneficiaries and those that advise them. Topics will include: the ever-thorny issue of disclosure, trust-owned companies, trustee removal, and how to effectively future-proof trusts.

This year’s conference is being held at the world heritage site of Trinity House near the Tower of London.

www.tenoldsquare.com
# THE LONDON TRUSTS CONFERENCE 2019

## PROGRAMME

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.30 pm</td>
<td>Registration and lunch</td>
</tr>
<tr>
<td>2.30 pm</td>
<td>Welcome</td>
</tr>
<tr>
<td></td>
<td>Francis Barlow QC, Head of Chambers</td>
</tr>
<tr>
<td>2.40 pm</td>
<td>Talks commence</td>
</tr>
<tr>
<td></td>
<td>Trusts and Disclosure</td>
</tr>
<tr>
<td></td>
<td>James Poole</td>
</tr>
<tr>
<td></td>
<td>Trust owned companies</td>
</tr>
<tr>
<td></td>
<td>James MacDougald</td>
</tr>
<tr>
<td></td>
<td>Fixing problems and future proofing Trusts</td>
</tr>
<tr>
<td></td>
<td>Georgia Bedworth</td>
</tr>
<tr>
<td>4.00 pm</td>
<td>COFFEE BREAK</td>
</tr>
<tr>
<td>4.15 pm</td>
<td>Trusts Under Fire</td>
</tr>
<tr>
<td></td>
<td>A panel discussion, led by Eason Rajah QC and Richard Dew, with break out sessions</td>
</tr>
<tr>
<td>5.30 pm</td>
<td>Can you trust me?</td>
</tr>
<tr>
<td></td>
<td>A lighthearted look at the world of Trusts</td>
</tr>
<tr>
<td>6.15 pm</td>
<td>Reception</td>
</tr>
<tr>
<td></td>
<td>Drinks and canapés and a guided tour of Trinity House and its artwork and antiques</td>
</tr>
</tbody>
</table>

## BOOKING INSTRUCTIONS

RESERVATIONS | lisawilson@tenoldsquare.com | +44 (0)207 405 0758
SPEAKERS PROFILES

Francis Barlow QC

Francis Barlow QC is Head of chambers and is a noted figure in traditional chancery circles both at home and abroad. He is highly respected for his expertise. “Revered for the quality of his broad traditional chancery practice and his outstanding knowledge of trusts”, Francis’ practice covers the full spectrum of Chancery matters, both contentious and non-contentious. As well as having particular expertise in drafting UK and offshore trusts and advising on their construction and effect and associated taxation issues, he has extensive experience in contested trust, probate and succession disputes.

"Hugely experienced and what he doesn't know about trust and wills law isn't worth knowing. He's a real heavyweight, but he's also got a light touch. Very, very thoughtful, he thinks about things for a long time." "If he says something, people will listen and believe it." Chambers & Partners 2019.

Simon Taube QC

Simon Taube QC's 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.

"Absolutely regarded as a star of the Bar, he is a most impressive senior practitioner whom you feel very comfortable with." "His mastery of paperwork is unrivalled. and he has a great track record at the Bar." Chambers & Partners 2019.

Eason Rajah QC

Eason Rajah QC was 'Private Client: Trusts and Probate' Silk of the Year 2018 in the Legal 500 Bar Awards and is described as a "superb all-rounder". Eason's practice includes domestic, off shore and cross-border trust and will disputes, related tax and professional negligence issues, drafting, structuring and advising in relation to trusts, succession planning and tax and related areas. Eason is Chairman of the Chancery Bar Association and a member of the committee of STEP Central London.

"His advocacy is outstanding and he is very, very persuasive in court." "He is incredibly robust, very strong and very direct. Constructive in his advice, he deals with complex disputes very well." Chambers & Partners 2019
Sidney Ross

Sidney Ross was called to the Bar at the age of 51, after a career of 24 years lecturing in Chemistry in the University of London. His practice is entirely in the field of trusts and estates, with particular emphasis on claims under the Inheritance (Provision for Family and Dependants) Act 1975. Sidney is the author of the textbook Inheritance Act Claims, the fourth edition of which was published by Sweet & Maxwell in September 2017 and has received positive reviews from Chancery and Family Law practitioners.

He is a frequent contributor of articles to legal journals on family provision and will construction.

David Schmitz

David Schmitz enjoys a varied Chancery and Commercial practice. He advises on trusts, and his updated review of claims in negligence against trustees has just been published by Lexis PSL. His main focus is on property litigation, and he has appeared in cases such as Grant v Edwards, CIBC Mortgages v Pitt, and Brightlingsea Haven v Morris. He has also appeared in Krasner v Denison (pensions and bankruptcy) and, more recently, in the two Harvey v Dunbar cases. He is a qualified mediator. He is on the reviewing panel for the Bar Pro Bono Unit and has also served as a borough councillor and planning committee member. He is currently writing a book on art and the law, which aims to cover all aspects of the law affecting the art trade and has published pieces on specific performance, on gagging clauses in contracts between the government and charities, and on the formal requirements in the execution of wills.

Susannah Meadway

Susannah Meadway is a leading junior within the private client arena, acting in difficult, complex and high-value matters, with a particular expertise in applications under the Variations of Trusts 1958. She enjoys a formidable reputation for her expertise in the fields of trusts and associated taxation, wills, probate and the administration of estates, and charities.

*"Her advice is very well considered, clear and concise, and she is technically excellent."*
*"She is a go-to person for technical trust issues, especially on variation of trust applications. Her advice is always spot on and she always inspires confidence in both lay clients and instructing solicitors."* Chambers & Partners 2019.
Robert Arnfield

Robert’s wide advisory practice involves trusts, wills, estates and tax planning or mitigation on behalf of individuals, executors and trustees. This will frequently involve nil-rate band, Agricultural Property Relief and Business Property Relief planning for Inheritance Tax and Capital Gains Tax deferral, including several recent Variation of Trusts Act 1958 applications to extend perpetuity periods.

“Absolutely knows his stuff and has gravitas. People respect what he says and listen to his advice without hesitation”. “Good at dealing with tricky technical work and meeting urgent deadlines, he always delivers clear, concise and invaluable advice”. Chambers UK, 2019 – Chancery

Evan Price

Evan has recent experience of dealing with sensitive cases where publicity may become a problem including court of protection cases and cases involving large estates. He often advises on cases where claims are made pursuant to the 1975 Act as well as all manner of claims about trusts and 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.

A “reliable practitioner who is very experienced and does his work very thoroughly”. He “provides forthright and commercial opinions, and is unflappable and clear in meetings”. Legal 500

Philip Jenkins

Philip Jenkins is an established Chancery practitioner with a particularly strong reputation for his advisory, drafting and litigation work in the fields of wills, probate, the administration of trusts and estates, real property and related professional negligence claims. "Authoritative, approachable and excellent with clients. An expert in all aspects of contested trusts and probate, Philip combines superb drafting skills with a natural and confident advocacy style. He is particularly effective in mediations given his ability to cut through to the heart of the issues." "Philip has a remarkable clarity of thought and always expresses himself in a way which clients of all kinds find straightforward and easy to understand".
Richard Dew

Richard Dew's practice is focused on trusts, wills and estates and related professional negligence issues. 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 the Chair of the STEP Contentious Trusts and Estates SIG and is an elected committee member 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 Administration of Estates and Parker's Modern Will Precedents and regularly writes and lectures on chancery and private client matters.

"Technically very good, whilst also being absolutely brilliant on his feet. He is an outstanding litigator and he knows how to approach cases tactically." "A practical lawyer who understands the commercial realities of these disputes. He's brilliant when handling difficult matters." Chambers and Partners 2019.

Georgia Bedworth

Georgia Bedworth 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.

"Very good on trust disputes, especially those concerning complex land and property aspects." "She is intelligent, bright and clear in her advice." Chambers & Partners 2019.

Naomi Winston

Naomi frequently advises on disputes involving the administration of wills and trusts, including the removal of trustees and personal representatives and breaches of duties. In addition, she is instructed in contentious probate and family provision claims and regularly deals with associated professional negligence issues. She has particular expertise in dealing with those estates or trusts which contain an interest in a partnership or assets issued by a partnership.

"Extremely bright" and "she brings huge enthusiasm and energy to all her cases." "Has displayed a very clear picture of her expertise …and is extremely client-friendly." Chambers and Partners 2019.
Leon Pickering

Leon Pickering has a chancery and commercial practice, with a particular emphasis on traditional chancery and the Court of Protection. His private client practice covers onshore and offshore trust and inheritance disputes and non-contentious work. He gives talks at seminars on all aspects of private client work and lectures on administration of trusts on the STEP diploma course. Leon is a member of the judiciary of the rugby football union. Leon is described as a barrister who "demonstrates brilliant analytical skills and is very good in court." "Manages client expectations well and is a very safe bet if you have very technical issues which need to be resolved."

Matthew Slater

Matthew Slater’s private client practice covers the full range of trust issues, on and offshore, contentious and non-contentious, including MN v OP, one of the most important, and high-value, Variation of Trust Act applications in recent years. He is one of the very few Chancery barristers on the Attorney-General’s A Panel of Treasury Counsel to the Crown. Matthew was formerly the Visiting Professor in Trusts at the Institute of Law in Jersey and has several years previous academic experience as a Lecturer in Trusts at Oxford University.

James MacDougald

James MacDougald 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.

"…very accomplished in his field, he has excellent technical skills and is always strong and forthright in his opinions." "He gets very involved in cases and fights tenaciously for the client." Chambers & Partners 2019.
James Poole

James has a very busy trust-based practice, including being led by Eason Rajah QC in Crociani v Crociani. He is regularly instructed on behalf of both trustees and beneficiaries in both contentious and non-contentious trust proceedings, ranging from TOLATA claims to applications under the Variation of Trusts Act 1958. Before coming to the Bar, James taught at secondary and tertiary level in England and Vanuatu, and is equally comfortable being instructed in both English and Bislama.

James Egan

James Egan advises and acts for clients in all areas of contentious and non-contentious matters including trusts, estates and associated taxation and appears regularly in his own right in the County Court and High Court. He regularly gives seminars across the country on private client as well as property matters. He is familiar with the application of the non-contentious probate rules including the use of standing searches and caveats. He has been praised as "very impressive".

James Kirby

James joined Chambers in October 2018 following the successful completion of his pupillage. He has already developed a busy practice across the full spectrum of Chambers' work, with a particular focus on private client work (both contentious and non-contentious). He appears regularly in both the High Court and the County Court, and his clients range from ultra high net worth individuals to trustees and executors of small but complex estates. He is also instructed by HMRC as junior counsel in ongoing tax avoidance litigation. Before coming to the Bar, he was a research fellow in History at Trinity College, Cambridge.