The Law Society

Private Client Section Engagement Programme

2020-2021

About the Section

The Private Client Section is a membership group to help practitioners working in wills, probate, estate and tax planning, trusts and mental capacity to be good at what they do, compliant with regulation and progress their careers.

Membership provides a tailored package of SRA continuing competency support through guidance on legal and market developments, enhancing soft-skills, expert commentary and peer networking.

To design the programme of member support, the Section receives recommendations from the Private Client Section Advisory committee and the wider membership including through feedback from surveys, on line discussions groups and events, etc. Our emphasis is to give our members guidance from experts in their fields who have day-to-day experience of dealing with the issues covered and can provide them with practical experience to assist with their unique challenges.

Our rolling programme is delivered through a range of inclusive activities including seminars, webinars, podcasts, e-newsletters, our Section magazines, website and our LinkedIn group, plus members receive discounts for related conferences, webinars and publications such as our Private Client Section annual conference.

For more information and to join, www.lawsociety.org.uk/privateclient/joinus

Foreword

**Welcome to the Law Society's
Private Client Section
2020/2021 engagement programme.**

The Section was established in 1997, to promote best practice and address current issues and challenges facing the community. The Advisory Committee's role is to provide expert practitioner input, guiding the Law Society on identifying issues, generating content and a wide variety of events, to ensure the engagement programme is both relevant and practical.

To design the programme of member support, the Section receives input from the Section Advisory committee and the wider membership through feedback from surveys, on-line discussions groups, events, etc.

The committee is keen to engage with the wider private client community and to hear from you, our members, to assist us in shaping your Section.

To give us your thoughts, seek our support or just to connect, please get in touch at privateclientsection@lawsociety.org.uk.

Kate Mahon
Chair of the Private Client Section Advisory Committee, solicitor and director at Davidson Mahon Solicitors.

Keep track of your professional learning

The Private Client Section have compiled a list of competency codes to help you record your professional development. Keeping track of your training can seem like one more task on a solicitor's to-do list. We have listed the minimum Solicitors Regulation Authority (SRA) continuing competency codes covered in our support for Private Client Section members.

What we've covered so far

The table below lists the SRA codes covered between 1 November 2019 and 31 October 2020 and the content still available. We will update this SRA training tracker throughout the year, as the 2019-20 programme rolls-out. The previous years' competency codes are available on the Private Client Section website.

SRA codes covered between 1 November 2019 and 31 October 2020			
When	**Name of product**	**Product type**	**SRA codes**
Nov 2019	PS Magazine: various articles including: Back to basics: Nil-rate band discretionary trusts	Inclusive	A1, A2, A3, A4, A5, B1, B2, B3, B4, B5, B6, B7, C1, C2, D1, D2
Feb 2020	Private Client Section: Older or incapable client double regional seminars: • Seminar 1: Elderly client case law update • Seminar 2: Court of protection applications	Inclusive	A2
February 2020	PS magazine: various including Back to basics: Welfare deputyships	Inclusive	A2
6 March 2020	*Private Client Section conference: Cross border	Discounted	A2
12 March 2020	PS E-newsletter: various	Inclusive	A2
31 March 2020	Private Client Section webinar: The law behind Trusts	Inclusive	A2
3 April 2020	PS E-newsletter - Covid theme	Inclusive	A2
24 April 2020	PS E-newsletter - Covid theme	Inclusive	A2
May 2020	PS magazine: various and Back to basics: European cross-border estates	Inclusive	A1, A2, A3, A4, A5, B1, B2, B3, B5, B6, B7, C1, C2, C3, D3
2 June 2020	PS E-newsletter - various	Inclusive	A2
10 Jun 2020	Private Client Section webinar: Inheritance tax case law update	Inclusive	A2

2 Jun 2020	PS E-newsletter: various	Inclusive	A2
24 – 25 Jun 2020	Private Client Section annual conference: • Online Probate Applications • Elderly client care • Private Client update	Inclusive	A2
21 Aug 2020	PS E-newsletter: various	Inclusive	A2
Aug 2020	PS magazine: various and Back to basics: Wills, trusts and care home fees	Inclusive	A2
5 Aug 2PM	Webinar: A practical toolkit for coronavirus	Inclusive	A2
25 Sept 2020	PS E-newsletter: various	Inclusive	A2
Sep 2020	PS magazine: Aimed at those in the early stages of their private client career	Inclusive	A2
9 and 10 Sept 2020	Private Client Section: Gifting homes and Private Client hot topics double webinar: • Private Client hot topics • Clients gifting their homes masterclass	Inclusive	A2
29 Sept 2020	Private Client Section webinar: Personal Injury Trust Masterclass	Inclusive	A2
13 Oct 2020	Private Client Section Elderly and vulnerable client care conference webinars: • Looking after vulnerable clients that want to co-habit • Bereavement soft skills for private client solicitors	Inclusive	A2
November 2020	PS E-newsletter: various	Inclusive	A2

Our programme for 2020/21

Below is the planned programme of Private Client Section support from 1 November 2020 to 31 November 2021 – including links to the OnDemand content. All the items below are inclusive to Private Client Section members except those marked with a * which are discounted to Section members

Over the next year the Section will host a range of events on issues that matter to private client solicitors details of these events will be published on our website (note the programme is subject to change): www.lawsociety.org.uk/private-client/events

Month	Name of product	Topic	Location
Nov 2020	Private Client Section podcast	Professor King's spotlight on the Law Society's video wills guidance	Online
	PS Magazine:	Various articles including Back to Basics: How to manage cryptocurrencies	Print
January 2021	PS E-newsletter	Various	Online
January 2021	Private Client Section podcast	Remotely building your professional private client network. Speakers: • Chris Claxton-Shirley solicitor, Tees • Linda Dack associate solicitor and head of the private client department, Watkins and Gunn solicitors	Online
February 2021	PS magazine	Various	Print
Feb/March 2021	Private Client Section webinars (double seminar replacement)	Typically focused on wills and vulnerable clients	Online
25 March 2021	*Private Client Section conference	Cross border conference	Online
April / May 2021	Private Client Section webinars (double seminar replacement)	Typically focused on Inheritance tax and trust issues	Online
May 2021	PS magazine	Various	Print
June 2020	*Private Client Section conference	Annual conference covering the key areas of private client law	TBC
August 2020	PS magazine	Various	Print
September 2020	PS magazine	Various	Print
September	Private Client Section	TBC	TBC

2020	double regional seminars		
October 2020	*Private Client Section conference	Elderly client topic care focused conference	TBC

OnDemand content still available to Section members from the previous year in addition to the above			
When	**Channel**	**Topic**	**Contributor**
Oct 2020	Private Client Section Elderly and vulnerable client care conference webinars	Bereavement soft skills for private client solicitors,	• Chris Claxton-Shirley, solicitor, Tees. • Kate Mahon, solicitor / director, Davidson Mahon Solicitors • Rebecca Mander, GuruYou
		Looking after vulnerable clients that want to co-habit	Melinda Giles, Head of Private Client, Giles Wilson Solicitors
Sep 2020	Private Client Section: Gifting homes and Private Client hot topics double webinar:	Private Client hot topics	Professor Lesley King, solicitor and lecturer
		Clients gifting their homes masterclass	Peter Stagg, Moore Barlow LLP
	PS magazine	Various topics aimed at those in the early stages of their private client career	Various
Aug 2020	PS magazine	Various and Back to basics: Wills, trusts and care home fees	Various
Jun 2020	Private Client Section annual conference:	Online Probate Applications	Kieran Bowe, partner, Russell-Cooke LLP.
		Elderly client care	Helen Clarke, solicitor and lecturer
		Private Client update	Professor Lesley King, solicitor and lecturer
	Private Client Section webinar	Inheritance tax case law update	• Naomi Neville TEP, senior associate solicitor, Irwin Mitchell • John Bunker, head of knowledge development, tax trusts and estates, Irwin Mitchell
May 2020	PS magazine	Various and Back to basics:	Various

		European cross-border estates	
March 2020	Private Client Section webinar	The law behind Trusts	Naomi Neville TEP, senior associate solicitor, Irwin Mitchell
February 2020	PS magazine	Various including Back to basics: Welfare deputyships	Various
	Private Client Section: Older or incapable client double regional seminars:	Seminar 1: Elderly client case law update	Helen Clarke, solicitor, lecturer and in-house trainer
		Seminar 2: Court of protection applications	Fiona Heald, partner, Moore Barlow LLP
November 2019	PS Magazine	Various articles including: Back to basics: Nil-rate band discretionary trusts	Various
September 2019	Private Client Section seminars	Professor King and topical issues in Private Client practice	Professor Lesley King
August 2019	*PS* Magazine:	Various articles including Back to Basics: Residence and domicile	Various
June 2019	Private Client Section webinar	Contentious probate for non-contentious probate practitioners	Charlotte John, barrister, Hardwicke Chambers
May 2019	Webinar	Probate disputes update 2019	• Paul Hewitt, partner, Withers worldwide LLP • Sarah Aughwane, senior associate, Withers worldwide LLP
May 2019	PS magazine:	Various articles including Back to basics: Trusts for disabled and vulnerable people	Various
March 2019	Private Client Section webinar	Managing ashes, pets and possessions	Fiona Heald, partner, Moore Barlow LLP

February 2019	Webinar	Lasting Powers of Attorney update	• Julia Abrey, partner, Withers Worldwide • Deborah Nicholls-Carr, associate, Withers Worldwide
February 2019	PS magazine:	Various articles including Back to basics: Welfare deputyships	Various
November 2018	*PS* Magazine:	Various articles including Back to basics: Drafting wills for overseas jurisdictions	Various

Further OnDemand content is available on the Private Client Section website www.lawsociety.org.uk/privateclient

Member Offer

In addition to the events and webinars previously listed your will receive

Inclusive E-newsletter

The Private Client Section has a dedicated e-newsletter for its members. As part of your Section membership, you will receive regular e-newsletters, with recent private client news, selected cases and commentary on developments in the field by Professor Lesley King and Roman Kubiak, partner and head of the Contested Wills, Trusts and Estates team at Hugh James

Inclusive PS Magazine

Our PS magazine focuses on the issues that matter in private client practice through features, commentary and updates from leading practitioners. 'Back to Basics' is a practical feature that deals with one key issue in extensive practical detail.

Here are some examples of our previous editions:

September 2020

August 2020

May 2020

February 2020

November 2019

September 2019

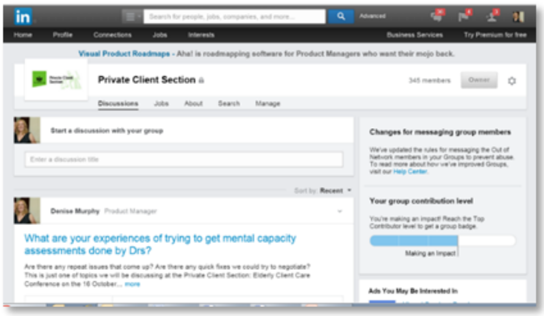
August 2019

May 2019

February 2019

LinkedIn

The Private Client Section enables members to share news, features, events and other relevant activities in a private environment. Increase your private client legal network and join our LinkedIn group.



To find our LinkedIn group use the link on the Private Client Section web page under About us, or enter the following in your Internet browser https://www.linkedin.com/groups/8320166

Website

The Private Client Section website is a one-stop portal of information for the legal community working in wills, probate, financial and tax planning, trusts, mental capacity and estate administration. It contains practical guidance, news, research and event details, we encourage you to use its search facility to provide quick access to the latest news updates, to search for past articles or practice notes. To access inclusive member only content, simply register and login on our web site www.lawsociety.org.uk/privateclient

If you have any difficulties accessing our events or content please do contact our membership services team Tel: 0207 320 5804 or Email: privateclientsection@lawsociety.org.uk

Committee

Thank you to our committee members

This programme of engagement was created in close consultation with the Private Client Section Advisory Committee to ensure it is relevant and timely.

Committee members meet multiple times a year to discuss the key issues facing the private client legal community. The committee advises on how the Law Society can best support its members who work in the fields of wills and probate, financial and tax planning, elderly client, estate administration, mental capacity, trusts, charities, family and relationships, and contentious probate.

The Section is chaired by Kate Mahon, a solicitor and director at Davidson Mahon Solicitors in Warwickshire, the vice-chair is Alberto Perez Cedillo, founding partner of Alberto Perez Cedillo Spanish Lawyers and Solicitors, which has offices in London and Madrid. Melinda Giles, a partner at Giles Wilson LLP in Essex, is the Private Client Council member.

The Law Society thanks all of the committee members for their time, commitment and contribution.

Committee Member	Organisation	Role
Alberto Perez Cedillo	Alberto Perez Cedillo Spanish Lawyers & Solicitors	Partner and solicitor
Charlotte Crawford	Hugh Jones Solicitors	Solicitor
Chris Claxton-Shirley	Tees	Solicitor
Fiona Heald	Moore Barlow LLP	Partner, head of Court of Protection and solicitor
Gareth Marland	Clarion Solicitors Limited	Director and solicitor
Kate Mahon	Davidson Mahon Solicitors	Director and solicitor
Linda Dack	Watkins and Gunn Solicitors	Associate solicitor and head of the Private Client Department
Melinda Giles	Giles Wilson LLP	Partner, solicitor and head of the private wealth team
Paul Clark	Spall Clark Solicitors	Solicitor and managing director
Sarah Murphy	Brabners LLP	Partner
Sophie O'Connell	Wolferstans	Associate solicitor and leads the Court of Protection Team
Stuart Adams	Mishcon de Reya	Associate solicitor