

SESSIONS

DAY 1 - 31/03/2022

Trusts in Litigation

30th March - 1st April 2022

Hotel Alfonso XIII

Seville

Registration

09:00 - 09:30

Co-Chairs' Opening Remarks

09:30 - 09:45

Participants

Richard Manyon - Partner, Payne Hicks Beach

Alison Regan - Joint Managing Partner, Russell Cooke

Keynote Session: Pandora Papers - how does this happen?

09:45 - 10:30

What can trustees and firms do to protect themselves before and after it happens?

Debate: The future of the role of the protector

10:30 - 11:15

Following the decisions in Re X Trusts and Re Riviera & Piedmond

Participants

Moderator: Natasha Stourton - Partner, Withers

James Brightwell - Barrister, Serle Court

Esmond Brown - Counsel, Appleby

Robert Christie - Jersey, Bedell Cristin

Coffee Break

11:15 - 11:40

Insolvency: Priority of claims to the assets of an insolvent trust

11:40 - 12:45

Workshop A

Has JCPC's decision in Investec/Re Z Trusts and/or SC's decision in Sequana changed the landscape?

Participants

Hannah Davie - Partner, Head of contentious estates and family disputes, Grant Thornton

Guillaume Staal - Partner, Dickinson Gleeson

Thomas Fletcher - Barrister, Maitland Chambers

Tax: Five biggest errors litigators can make when it comes to tax!

11:40 - 12:45

Workshop B

Participants

Moderator: Mark Lindley - Partner, Boodle Hatfield

Aidan Briggs - Barrister, New Square Chambers

Ruth Hughes - Barrister, 5 Stone Buildings

Family: Practical problems with settlement of trust and estates disputes within a family

11:40 - 12:45

Workshop C

- Use of arbitration
- Approval of settlements by the court
- Settling probate disputes

Participants

Moderator: Julia Burns - Mediator and Conflict Coach, Dove In The Room

Izzy Walsh - Partner, Head of London, Hall Brown

Joseph de Lacey - Senior Associate, Farrer & Co

Lunch

12:45 - 13:45

Interactive discussion: Session curated by Women in Chancery

13:45 - 14:30

Participants

Henrietta Mason - Consultant, Farrer & Co

Tamasin Perkins - Partner, Charles Russell Speechlys

Linda Spink - Executive, Leadership & Parent Transition Coach, My Family Care, Bright Horizons UK

Adam Carvalho - Career Coach, The Carvalho Consultancy

Contentious Court of Protection: Oops! I Did It Again!

14:30 - 15:15

Appointment of Deputies – Practical problems with Deputies – England and other jurisdictions

General Contentious Court of Protection

Participants

Nicola Bushby - Partner, Irwin Mitchell

Jordan Holland - Barrister, 5 Stone Buildings

Michael Mylonas QC - Barrister, Serjeants Inn

Coffee Break

15:15 - 15:40

The Psychology of Giving Evidence and Effective Witness Preparation

15:40 - 16:20

Participants

Ed Williams QC - Barrister, Assurety Training

Jason Galbraith-Marten QC - Barrister, Co-Founder, Assurety Training

Andy Hobbs - Performance Psychologist, Assurety

Debate: Blessing, Surrenders and (avoiding) making decisions – How and when do trustees go too far?

16:20 - 17:00

Participants

Tom Roscoe - Barrister, Wilberforce Chambers

James Sheedy - Partner, Baker & Partners

Rosalind Hetherington - Senior Associate, Maurice Turnor Gardner

Simon Davies - Partner, Ogier

Co-Chairs' Closing Remarks

17:00 - 17:10

River Cruise (hosted by Serle Court)

18:30 - 20:00

Dinner (hosted by XXIV Old Buildings and TBC)

20:00 - 22:00

SCHEDULE

DAY 1 - 31/03/2022

Trusts in Litigation

30th March - 1st April 2022

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Seville

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10:00	10:30 - Debate: The future of the role of the protector	10:30 - Debate: The future of the role of the protector	10:30 - Debate: The future of the role of the protector
11:00	11:15 - Coffee Break 11:40 - Insolvency: Priority of claims to the assets of an insolvent trust	11:15 - Coffee Break 11:40 - Tax: Five biggest errors litigators can make when it comes to tax!	11:15 - Coffee Break 11:40 - Family: Practical problems with settlement of trust and estates disputes within a family
12:00	12:45 - Lunch	12:45 - Lunch	12:45 - Lunch
13:00	13:45 - Interactive discussion: Session curated by Women in Chancery	13:45 - Interactive discussion: Session curated by Women in Chancery	13:45 - Interactive discussion: Session curated by Women in Chancery
14:00	14:30 - Contentious Court of Protection: Oops! I Did It Again!	14:30 - Contentious Court of Protection: Oops! I Did It Again!	14:30 - Contentious Court of Protection: Oops! I Did It Again!
15:00	15:15 - Coffee Break 15:40 - The Psychology of Giving Evidence and Effective Witness Preparation	15:15 - Coffee Break 15:40 - The Psychology of Giving Evidence and Effective Witness Preparation	15:15 - Coffee Break 15:40 - The Psychology of Giving Evidence and Effective Witness Preparation
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18:00	18:30 - River Cruise (hosted by Serle Court)	18:30 - River Cruise (hosted by Serle Court)	18:30 - River Cruise (hosted by Serle Court)
19:00			
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SESSIONS

DAY 2 - 01/04/2022

Trusts in Litigation

30th March - 1st April 2022

Hotel Alfonso XIII

Seville

Registration

09:00 - 09:30

Co-Chairs' Opening Remarks

09:30 - 09:35

Participants

Simon Goldring - Partner, Maurice Turnor Gardner

Gemma Willingham - Partner, Baker & McKenzie LLP

Keynote Session: Reflections on being the Chief Master

09:35 - 10:15

How to win? Irritations, good and best practice

Participants

Matthew Marsh - Former Chief Master, Courts and Tribunals Judiciary

Variation of trusts – Should there be a substratum rule as argued in Wong?

10:15 - 10:45

Quick Fire Debates

Participants

Timothy Sherwin - Barrister, XXIV Old Buildings

Jemma Goddard - Associate, Stewarts

Letters of Wishes – Do trustees stick too rigidly to their terms?

10:45 - 11:15

Quick Fire Debates

Participants

Clare Usher-Wilson - Director, Family Office Services, Summit Trust International

James Lister - Partner, Stevens & Bolton

Private International Law: Conflict of laws, forced heirship and all the things you don't know!

11:15 - 11:45

Quick Fire Debates

Participants

Robert Gibson - Senior Associate, Taylor Wessing

Marion Binder - Counsel, LALIVE

Coffee Break

11:45 - 12:00

A. Trustee decision making: Is sustainability an important factor in investment decisions?

12:00 - 13:00

Workshop A

- ESG investing – are trustees at risk that returns suffer and open themselves up to criticism?
- How do you define sustainability?

Participants

Moderator: Yindi Gesinde - Partner, Baker McKenzie

Stephen Alexander - Partner, Mourant

Charlie Maydon Grace - Senior Counsel, Macfarlanes

Civil Procedure: Access to open justice, do different Courts treat you differently?

12:00 - 13:00

Workshop B

- Diverging approaches of the Family Courts and the Chancery Division
- Should you be entitled to privacy? Open Justice vs Confidentiality
- Offshore vs Onshore approaches

Participants

Ben Harvard - Partner, Collas Crill

Giles Hall - Associate, Penningtons Manches Cooper

Estate Administration / Succession: 1975 Act – How to craft appropriate awards to meet particular needs

12:00 - 13:00

Workshop C

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Participants

Moderator: Ashleigh Carr - Senior Associate, Forsters

Sophia Rogers - Barrister, Radcliffe Chambers

David Grant - Barrister, Outer Temple Chambers

Bodega Tour, lunch and wine tasting (hosted by Summit Trust and Wilberforce Chambers)

13:00 - 16:30

River Cruise (hosted by Serle Court)

16:30 - 18:30

SCHEDULE

DAY 2 - 01/04/2022

Trusts in Litigation

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