

January 2025

Liverpool Law

Liverpool  Law Society

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



**Welcoming our
new President:**

**James
Mannouch**

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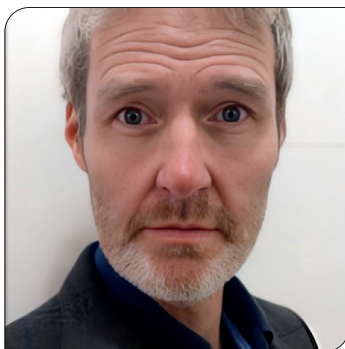
January 2025

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 July 2025 edition: Tue, 24.06.25
 August 2025 edition: Tue, 22.07.25
 September 2025 edition: Fri, 22.08.25
 October 2025 edition: Tue, 23.09.25
 November 2025 edition: Tue, 21.10.25
 December 2025 edition: Tue, 25.11.25

Word Count Guidelines: Notes for Contributors

We receive many enquiries about submitting articles for LLS News and one of the questions that comes up every time is 'how long should it be?' While we don't (in theory) restrict the number of pages you can write, there are a few guidelines that you need to follow, like how many words fit on a page, how photographs, affect the word count etc.

With this in mind, the following is a rough approximation of how we calculate word counts for articles:

A full page of text is around 750 words without images, and 400 for a half page. The amount of text space an image takes up depends entirely on how it relates to the text (e.g. a by-line photo will take up less room than something illustrating the main theme of the article). So, we would suggest the following:

Full page with one small* image: 690 words
 Full page with two small* images or one medium** image: 480 words
 Full page with one large*** image: 480 words
 Half page with one small image: 330 words

The word counts do not include the main heading or secondary headings, but do include sub-headings.

* Spanning a single column
 ** Spanning two columns
 *** Spanning three columns



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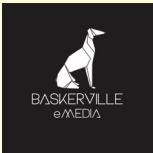
Liverpool Law Society Magazine is produced by and for Liverpool Law Society Members. This is our opportunity to share our news, events and celebrations with our friends in the legal community.

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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The views and opinions expressed in Liverpool Law are those of the individual contributed and not those of the Liverpool Law Society.

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Editorial Committee Dates 2025

Meetings start at 01.00 pm except where stated

- Wed, 15 Jan 25 at 12.00pm*
- Mon, 17 Feb 25*
- Tue, 18 Mar 25*
- Mon, 14 Apr 25*
- Mon, 19 May 25*
- Tue, 17 Jun 25*
- Tue, 15 Jul 25*
- Tue, 19 Aug 25*
- Tue, 16 Sep 25*
- Wed, 15 Oct 25*
- Tue, 18 Nov 25*

Welcome to the January edition of Liverpool Law



Happy new year to you all! I hope you managed to have a well-earned break over the Christmas.

We can sometimes have a smaller edition of the magazine in January with everyone being away- but not this month, you have all been as busy as ever.

Here at LLS we welcome our new President **James Mannouch** and wish him the best of luck. We also have details of your 2025 general committee and details of how to get involved with committees if you are interested. James was given a lot of information at our last editorial meeting and I look forward to working with him this year and seeing all he will achieve.

This month we also said thank you to our long-standing Director **David Tournafond** who has stepped down from his role after an amazing 29 years. I have seen first-hand the wonderful and rewarding work David has done on the education and charities committee and wish him the best of luck with his future endeavours.

For our leaders in the law this month we have a column from my colleague and Regional Office Head, **Martin English**. Please take time to read this if you can. It is sometimes difficult to bring a personality through in an article, especially when discussing big important topics such as running a head office, but I'm sure you will agree Martin's kindness and warmth shines through. I hope you are all as lucky to have someone heading up your offices as we are at Weightmans to have Martin.

Finally you will see we have a busy calendar of events coming up for you to attend online or in person. As always if you have any feedback on anything you would like to see more or less of please let us know. This is your magazine and your local law society and as our Immediate Past President **Gaynor** aptly put we are all stronger together.

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 December's General Committee meeting. There were 13 individuals from the following organisations:

- 7 Harrington Street Chambers
- Bond Turner
- Fletchers Solicitors
- Hill Dickinson LLP
- Liverpool Hope University
- Paul Crowley & Co
- Water Services Regulation Authority (Ofwat)

Liverpool Law Society's membership now exceeds 2,450 individuals from 225 law firms, barristers' chambers, and other organisations with legal professionals in the Liverpool City Region and beyond.

From the President

The latest from our new President, James Mannouch

I am honoured to be President of Liverpool Law Society ('LLS') and I am looking forward to serving the Society in 2025.

Sarah Poblete (CEO) and her team, together with the Officers, Directors and Committee members of LLS are all vital to the success of LLS and I am fortunate to have such friendly, hardworking and professional people close at hand.

Past President **Gaynor Williams** was a brilliant mentor in my year as Vice President and I am incredibly grateful to her for imparting her knowledge about the workings of LLS. I am also grateful for the past Presidents that have supported my journey towards becoming President, and I promise that I will do my best to make this year a success.

A little bit about me, I work for the University of Law, overseeing its legal advice centres at the Liverpool and Chester campuses. I previously lectured at the University and taught at LJMU and BPP. Professional legal education is changing, and this is something I look forward to exploring with members during my year in office.

In private practice, I was privileged to work at Hill Dickinson and Dyne Solicitors, where I functioned as Commercial Director. I came to law late, having begun my career in television advertising working for WPP. This was in the 1990s and the workplace was quite different. Email was relatively new, the internet was yet to become a distraction, and working late was par for the course. Looking back, advertising had a lot in common with law. It was very professional and very disciplined, contrary to most people's view of the industry. I returned to the Northwest to work across Great Universal Stores before heading-up Bunnings Retail's customer service division.

In December 2011, I became a Director of LLS and began to chair its Environmental Law Sub-Committee. I subsequently chaired the Society's Training Committee, Access to Justice Committee and Finance & Policy Committee. The specialist sub-committees function as a nervous system to the Society and the amount of work they deal with is impressive. From responding to government consultations and lobbying, to updating and training, agendas are full and participants busy. I would encourage any interested members to find out more about our sub-committees and to consider co-option. I have set myself two broad objectives for the year ahead. The first is to improve links with the regional business community. A company's ability to access the right legal services is paramount to its protection and growth. Legal services sit within the broader remit of professional services, and I shall be exploring how peer organisations work to create opportunities for their members. My second objective is quite



different. Access to justice centres on publicly funded legal services, but this should not prevent lawyers from engaging in pro bono work. Each of us is privileged to do the job we do, and I aim to facilitate lawyers and firms who wish to donate their time.

Like my predecessor, **Gaynor Williams**, I care about charity work, and this is something the society has committed to for many years. Gaynor worked hard in her year to raise funds for her nominated charity and to establish a new legal advice centre on the Wirral. I hope to continue in this vein, supporting the work of Liverpool Round Table.

My first official engagement in 2025 is a "Celebration for new entrants to the legal profession" at the Raquet Club on Wednesday 29th January at 6pm. **HHJ Menary KC DL** has kindly agreed to hand the Certificates of congratulations to the newly qualified lawyers. This is always an enjoyable evening, and a chance for junior lawyers to make new friends. I look forward to meeting lots of people in the coming year but if anyone reading this wants to contact me direct or speak to me about the society or my plans, please feel free to do so.

James Mannouch
President
president@liverpoollawsociety.org.uk

LLS Meetings & events – Jan/Feb 2025

Start Time	Meeting/Event
09/01/2025 16:00	Family Business Sub-Committee
14/01/2025 12:30	General Committee
15/01/2025 13:00	Civil Litigation Sub-Committee
16/01/2025 13:00	Directors' Meeting with LCR Councillors
15/01/2025 12:00	Editorial Sub-Committee
21/01/2025 16:00	Local Law Society meeting (online)
23/01/2025 09:00	Deadline for February edition of Liverpool Law
23/01/2025 13:00	Future Planning Sub-Committee
23/01/2025 16:00	Criminal Practice Sub-Committee
28/01/2025 12:30	Finance & Policy Sub-Committee
29/01/2025 13:00	EDI Sub-Committee
29/01/2025 17:30	Newly Qualified Evening
30/01/2025 12:00	Joint V meeting (hosted by Birmingham Law Society)
04/02/2025 13:00	Employment Law Sub-Committee
06/02/2025 13:00	Access to Justice Sub-Committee
11/02/2025 12:30	General Committee
13/02/2025 13:00	In-House Lawyers 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
Civil Litigation	Civil Justice Council consultation on litigation funding	31.01.25
Non-Contentious Business	Business Tenancies 1 Consultation Paper	19.02.25
Employment	Costs protection in discrimination claims: Call for Evidence	19.02.25
Regulatory	Client money in legal services - safeguarding consumers and providing redress: The model of solicitors holding client money	21.02.25
Regulatory	Client money in legal services - safeguarding consumers and providing redress: Protecting the client money that solicitors hold	21.02.25
Regulatory	Client money in legal services - safeguarding consumers and providing redress: Delivering and paying for a sustainable compensation fund	21.02.25

Call to action: LLS members' views sought on SRA consultation papers including holding client money

Liverpool Law Society's Regulatory Committee, chaired by Mickaela Fox, is looking for members' views on the following SRA Consultation Papers:

- [Client money in legal services – safeguarding consumers and providing redress: The model of solicitors holding client money](#)
- [Client money in legal services – safeguarding consumers and providing redress: Protecting the client money that solicitors hold](#)
- [Client money in legal services – safeguarding consumers and providing redress: Delivering and paying for a sustainable compensation fund](#)

Immediate Past President Gaynor Williams explains “They are all important consultations, however, the first one, the model of Solicitors holding client money, is particularly important and the Committee thought it would be helpful to get views, feedback and responses from a wide range of firms in different practice areas. The reason being that different sizes and practice specialisms will have different views, eg conveyancers will have a different view to civil litigators or small firms that don't hold much money”.

The Immediate Past President has asked if you could share these consultations within your firms and feedback with any answers to the 15 questions to committees@liverpoollawsociety.org.uk before close of business 10 January 2025.

Once responses are in, Mickaela will then set up another regulatory meeting to discuss the feedback/outcomes with a view to submitting responses.

The link to all 3 responses can be found on the SRA website at <https://www.sra.org.uk/sra/consultations/>

Any views and comments you could give Liverpool Law Society's Regulatory Committee would be gratefully received.

Spotlight on: Martin English of Weightmans



1. Briefly describe your role as Regional Office Head and the main duties of this position.

I lead our 750 people in Liverpool in establishing and maintaining the culture and values of our firm, on how we work together and with our clients, making our firm a better place to work. I also oversee our fantastic fundraising work with our nominated charity, our ESG activities contributing to community projects such as Everton in the Community, and our work enhancing our business and professional links across the Merseyside region.

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

It is an honour to hold the Regional Office Head role and there are genuinely no negatives to it. The time I give to the role is more than paid back from witnessing the enthusiasm, energy and positivity of the people that make up Weightmans. In terms of the most positive of the positives, I am always humbled by the effort of our people go to help each other and to the time and energy they put into fundraising activities. Exemplified by their efforts in raising over £50,000 for Clatterbridge Cancer Charity in the previous year.

3. What changes to the running of the firm have you implemented because of Covid?

I was not the Regional Office Head at the height of Covid, but the very nature of the pandemic and of the role itself, made it a challenging time. Diminishing office attendance meant lateral thinking was required to maintain our cohesive, open and positive environment. We found new ways to collaborate, socialise and work with the local community, and put a strong emphasis on mental health and welfare support. As we have returned to our hybrid working model, we have maintained some of the positive changes and support mechanisms brought about by the pandemic.

4. As a result of Covid, what are your new agile working policies and why?

We are a forward-looking law firm who has our people at the centre of what we do. We were the first large law firm to introduce flexible working hours (many years ago now), which was a key positive factor of Weightmans for me personally when raising young children. Our firm had already travelled far down a path to hybrid working before the pandemic, with most of our offices nationwide working an even balance of office and home days before March 2020, including our Liverpool office. That being the case, we have not had to substantially change our policies. We overcame the challenge of Covid and continued onwards with our hybrid working pattern once the pandemic relented.

5. What do you see as your biggest challenges?

To overcome some of the residual and more subtle effects of the Covid pandemic. We have a generation of lawyers who missed out on building their own local business and professional networks, and the skills developed from building those relationships. Empowering that generation of lawyers to overcome that lost time, both within Weightmans

and more widely in Liverpool, will be important to strong and prosperous local legal sector.

6. What aspects of the firm are you most proud of?

We have undertaken a lot of work around equity, diversion and inclusion to break down historical barriers to access to the legal sector. We have restructured our graduate and apprenticeship programmes and initiated meaningful change in how we recruit. We work closely with D&I Advocates across the firm to celebrate our diverse backgrounds and educate each other on matters of race, religion, disability, sexual orientation, gender and social mobility. Nothing is closer to my heart than fostering a workplace which welcomes everyone's backgrounds and talents, and our office is much richer for it.

7. Where do you see the firm ten years from now?

We have grown as a firm significantly in the past 10-15 years, but almost half of our people are still based in Liverpool and our history with Liverpool goes back almost 200 years. We are really proud of our Liverpool heritage. I think moving forwards 10 years, Weightmans will be a bigger firm – bigger nationally, bigger in Liverpool – with innovative ways of working and delivering legal services, whilst still keeping our people at the heart of what we do.

8. What legacy, as Regional Office Head, would you like to leave the firm?

The acid test for me is whether the office is in a better place when I relinquish the Regional Office Head role than when I took over the role 18 months ago. That means maintaining our place at the heart of the Liverpool professional, business and legal community, and still being known as a great place to work.

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Andrew Holroyd – 50 years a solicitor



Anyone who reaches the milestone of doing the same job for 50 years has undoubtedly lived through massive changes and will have many tales to tell. When you have survived 50 years as a solicitor in Liverpool that is certainly true.

On 2nd December 2024 **Andrew Holroyd** will have been on the roll of solicitors for 50 years.

I have been privileged to work alongside Andrew for 38 of those years and I suppose I know him as well as anyone in the profession but when I look back at all that he has done in that time I am not sure I can much more than scratch the surface. Working with him has always been an adventure and his appetite for change and improvement has never dimmed.

Andrew is fond of telling stories of his early legal career when he articulated to **Stuart Christie** at Alsop Stevens Batesons (now DLA Piper). There are tales of arresting ships and being given a lesson in litigation by the legendary **E Rex Makin**.

However Andrew's passion, even in 1974 as a newly qualified solicitor, was not going to be satisfied by commercial law. He tells me that he had seen this law firm in Toxteth, Jackson & Canter that he liked the look of, the sort of place where he could make a difference. He knocked on the door and asked for a job only to be told that none was available!

If you know Andrew you know that he does not give up easily. In the summer of 1975, **Philip Canter** and **Howard Jackson** saw sense and got in touch. An "interview" was held one

morning in a very shabby office at 62 Dale Street. Across the desk was Howard sporting a very bushy beard, behind mounds of dog-eared papers. The first question was to ask if he would care for a tot of Jamesons whiskey. The next was to ask about his footballing preference and the "bluish" leanings fitted him perfectly for the job. The rest, as they say, is history.

Over the years as a partner in Jackson & Canter he was instrumental in creating a law firm committed to those areas of practice which touched the lives of the most disadvantaged in society. Immigration became a particular speciality and working with the Somali shopkeepers in Toxteth meant he was truly embedded in the community.

The firm was one of the first to be awarded a "franchise" for Legal Aid work. He made sure that the firm was accredited for Investors in People and other quality marks. His passion was to make sure that the firm delivered the best legal service to every client regardless of means. Under his leadership the firm won many awards locally and nationally for the work in Legal Aid, Human Rights and Pro Bono work. It was Andrew's drive, commitment, vision and initiative which led to the business growing, merging with or acquiring other firms and moving into new areas of work.

The firm which now trades under the name Jackson Lees is part of the MAPD group – a group of law firms across the country. Andrew is one of those responsible for compliance, bringing his vast experience and expertise to the next generation of lawyers and making sure that the highest standards are maintained.

In his career Andrew has been President of Liverpool Law Society, President of the Law Society of England and Wales, he was awarded the Order of the British Empire and then later the Commander of the British Empire. He could call himself "Dr" Holroyd as he holds an honorary doctorate from Nottingham University. He could also call himself Canon as he is a lay canon of Liverpool Cathedral. That he chooses not to do so is a measure of the man.

Space does not allow me to list all the committees he has served, all the initiatives he has started, all the people he has championed outside of his legal career.

Even after 50 years his passion for the law and making a difference is undimmed. His wisdom and guidance are available to all those who seek them. Not many will reach the heights he has reached but for all those of us who have worked with him and continue to do so we recognise that we are privileged to do so.

Congratulations Andrew on this amazing achievement – let's hope there are many more adventures to come.

Chris Topping

Broudie Jackson Canter

DLA Piper and UK Government lawyers recognised for Outstanding Collaboration by British Legal Awards

The British Legal Awards has recognised DLA Piper's work alongside lawyers from the Government Legal Department (GLD) and the Department for Digital, Culture, Media and Sport (DCMS) commercial and ceremonials team in delivering the Coronation of their Majesties King Charles III and Queen Camilla as the sector's 'Outstanding Collaboration of the Year'.



Sarah Bell



Susanna McGibbon



Sarah Goom

DLA Piper lawyers, and those from GLD and DCMS came together to deliver, at pace, the myriad of complex legal agreements in less than five months. These included collaboration agreements, memoranda of agreement, volunteer agreements and licences to occupy key buildings and areas, dealing with issues such as monument protection and provision for domestic and international media.

Sarah Bell, partner at DLA Piper, comments: "This award recognises just what can be achieved through great collaboration, a true partnership approach with clients, and a strong team working ethos. The whole team worked tirelessly in the run up to the Coronation, and in very quick succession to working on the Queen's Platinum Jubilee celebrations, another milestone project, to successfully deliver the complex and time sensitive support required. We're honoured to have

supported Government with another historic, and successful event."

Susanna McGibbon, Treasury Solicitor and Permanent Secretary to the Government Legal Department adds: "Congratulations to GLD lawyers in DCMS Legal Advisers and our Commercial Law Group along with colleagues in DLA Piper for winning Outstanding Collaboration at the British Legal Awards. The win is worthy recognition of months of great teamwork leading up to a historical and defining moment for the country. An excellent example of partnership working between GLD and the private sector – I am so proud of all those involved."

Sarah Goom, Director General, Commercial with Trade and International concludes: "I'm very proud of the work of my colleagues in DCMS Legal Advisers and GLD's Commercial Law Group for their

collaboration with DLA Piper on the run-up to the Coronation. It is excellent to see the work of government lawyers celebrated at such a prestigious event."

The DLA Piper team, led by **Sarah Bell**, included associate **Rhiannon Bidwell**, legal director **Gemma Cowap**, associate **Mike Temple**, senior associate **Sarah Foulkes**, associate **Liam Green**, senior associate **James Parker**, senior associate **Simon Tingle**, partner **Ben Peacock**, senior associate **Jon Baker** and project analyst **Anne Ryan**.



Long-standing director steps down after 29 years



Emlyn Williams, David Tournafond and Alison Lobb



David receiving his gift



Alistair Fletcher, Philip Rooney and David Tournafond

David Tournafond, solicitor, retired from being a director of Liverpool Law Society at the AGM held on 28 November 2024. David was our longest serving director, with an incredible 29 years' service, he has also been chair of the Education and Charities sub-committee for 28 years. He has, at all times, had the Society's best interests at heart, contributing with valued ideas and guidance, and always wise words. He is a true gentleman, and we have been very lucky to have his support for so long. On behalf of current and past directors of the Society, I thanked David for all he had done for the society over so many years. As the saying goes *"this is not goodbye, it is see you later"*. As a thank you, the directors and past presidents presented a gift to David on behalf of the society, its staff, Directors, Officers and members. The gift is a framed photograph of the Three Graces at night with an inscription.

Gaynor Williams
Immediate Past President



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Directors of Liverpool Law Society for 2025

The Society's main committee is made up of up to 27 directors, who are practising solicitors, cost lawyers or lecturers in law. We have a representative group of people from a range of small, medium and large firms, in-house lawyers, and educational establishments.

Outside of the monthly meetings of the 'General Committee', the directors also meet twice a year with local MPs where there is exchange of information. News about bills going through parliament and constituent issues are also raised and discussed. Separately, the directors also meet twice a year with the nominated councillors from the Liverpool City Region local authorities. This again is a useful way of ensuring our members' concerns and issues, including those of their clients, can be raised at one of these meetings. The councillors also come to the Society with matters their constituents are facing and we work

together on joint initiatives where there is a common aim.

The Society also has good communication channels with The Law Society and the SRA where members' issues can be raised and matters affecting the legal profession discussed.

On a regional level, Liverpool Law Society is a member of the Joint V, a grouping of autonomous local law societies that meet and discuss common issues affecting membership organisations for legal professionals, sharing best practice. The members of the Joint V are Birmingham, Bristol, Leeds, Liverpool and Manchester Law Societies. United the Joint V have a strong voice nationally, representing over 16,000 legal professionals.

The current directors of Liverpool Law Society who form the General Committee from December 2024 – December 2025 are:

Officers

President

Mr James Mannouch, University of Law

Vice President

Ms Sarah Mansfield, Excello Law

Deputy Vice President & Joint Hon. Secretary

Mr Alum Ullah,
Bond Turner

Honorary Treasurer

Mr John-Paul Dennis

Joint Honorary Secretary

Ms Nicola Harris, MSB

Immediate Past President

Ms Gaynor Williams,
Bennett Williams Solicitors

Sub-Committee Chairs

Access to Justice Sub-Committee

Mr Ian Townley, Broudie Jackson Canter

Civil Litigation Sub-Committee

Mr Jonathan Berkson, Bermans

Criminal Practice Sub-Committee

Mr Paul Kilty, DPP

Editorial Sub-Committee

Ms Jennifer Powell, Weightmans

Education & Charities Sub-CommitteeMr Jeremy Myers,
Husband Forwood Morgan**Employment Law Sub-Committee**

Ms Lindsey Knowles, Brabners

Equality, Diversity & Inclusion Sub-Committee

Ms Jewels Chamberlain, DWF

Family Business Sub-Committee

Ms Haley Farrell, Jackson Lees Group

In-House Lawyers' Sub-Committee

Ms Rachel Stalker, LJMU

Non-Contentious Business Sub-Committee TBC**Regulatory Sub-Committee**

Ms Mickaela Fox, Weightmans

Other post holders**Parliamentary Liaison Officer**Ms Lauren Cannon,
In-House Legal Solutions**Public Relations Officer**

Mr Anthony Neild, JMW Solicitors

Other Members of the CommitteeMs Pamela Chesterman,
Irwin MitchellMr Kevin Donoghue,
Donoghue SolicitorsMs Nichola Halpin,
Liverpool University Hospitals NHS
Foundation Trust

Ms Millie Hayden, Brabners

Ms Lorna Mitchell,
University of Liverpool

Ms Nina Sahu, Hill Dickinson

Ms Sally Stanway, JMW Solicitors

Ms Nicola Walker, University of Law





The General Committee looks forward to a busy 12 months under the helm of the president, James Mannouch.

Interested in getting involved with Liverpool Law Society but unsure where to start?

The specialist committees are a place where members of the Society can come together to discuss current issues in your area of practice, exchange information and best practice, respond to government consultation papers and contribute towards the Society's legal training programme. If you would like to find out more about the work of the specialist committees and/or request to join one or more of them, please [click here](#).

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ENQUIRE

Bermans strengthens property and healthcare expertise with new partner



Usha Sharma and Fergal O'Cleirigh

Law firm Bermans has expanded its property team and its healthcare sector offering with the appointment of Usha Sharma as a partner.

She has joined Bermans' Liverpool office from Brabners' real estate team, where she was a legal director and co-led and managed its property healthcare team across all four offices.

Usha advises clients on a range of commercial property matters, including landlords and tenants on lease negotiations, and companies and individuals on acquisitions and disposals of investment land.

She has nearly 25 years' experience as a qualified solicitor and is recognised in the current Legal 500 for her commercial property work.

Her move to Bermans follows the arrival of corporate partner **Paul Edels** and senior paralegal **Paul Rabbette** last month. They specialise in advising clients in the healthcare sector, including dental practices, pharmacies and opticians, on a range of transactions and commercial matters. **Fergal O'Cleirigh**, head of Bermans'

Liverpool office and the property and construction team, said: *"Usha is an excellent addition to our ranks, and her wealth of experience adds significantly to the existing quality and talent in our team.*

*"She will be working closely with **Phillipa Baty**, who recently rejoined us, and together they will provide the wider team with greater depth to support our commercial property clients.*

"Added to this, Usha's expertise in the healthcare sector will further strengthen our offering in this field."

Fergal added: *"The firm remains committed to further strong growth and we anticipate more senior hires across the firm across our Liverpool and Manchester teams during 2025."*

Alongside her commercial property work, **Usha** is actively involved in promoting diversity in the legal profession and was recognised for her achievements as a finalist in the 2023 Northern Power Women Awards.

She is a member of Liverpool Law Society's equality, diversity and inclusion committee

and the Cheshire and Merseyside Legal Diversity Group, which helps students from disadvantaged backgrounds seeking opportunities in the legal sector.

She spearheaded the region's inaugural Law Programme, an initiative aimed at widening access to the legal profession, which was launched in 2023 as part of a public-private network with Liverpool City Council and Liverpool Chamber of Commerce.

Usha said: *"It's an exciting time to join Bermans. What has struck me is how the firm manages to maintain such a strong reputation for delivering exceptional client service while also fostering a culture that supports its people.*

"It's the perfect environment in which to continue my professional development and I am looking forward to helping with the firm's strategic ambitions and to making a positive difference to our clients."

Bermans is part of MAPD Group, which was founded by **Brian Cullen** and **Joanna Kingston-Davies** in 2020 to power the growth of local law firms nationally through acquisition. The initials stand for Making a Positive Difference.



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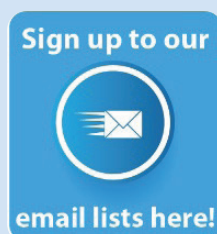
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Please check your junk or spam folder. Email providers constantly update their spam filters so even though you used to receive our emails, suddenly this might stop.

Our training, member and general news & events emails will come from legalnews@liverpoollawsociety.org.uk and automated messages from our website (such as when making a booking for one of our courses or events) will come from enquiries@liverpoollawsociety.org.uk.

We suggest you regularly check your junk email and add both these LLS email addresses to your 'safe senders' list to ensure you receive news, events and invitations from Liverpool Law Society!

Not signed up?



Hill Dickinson advises on completed deals with aggregate value of over £1.8bn in first half of financial year

Leading commercial law firm Hill Dickinson has reported a strong start to its financial year, advising on 95 completed deals in the period May to November 2024, equating to over £1.8bn of transactions.

The strong performance from the firm's corporate team comes off the back of a seventh successive year of firmwide growth, which saw its turnover increase to £145.5 million, up by 12% from FY22/FY23.

The 95 deals the team advised on cover a variety of sectors including professional services firms, manufacturing and life sciences. Significant transactions include the sale of Innovisk Capital Partners, a leading international supplier of specialist insurance services, to Chicago-based Ryan Speciality, as well as the sale of Blackpool-based Fox Brothers to Stellex Capital Management. The team also advised EA Technology, a solutions provider for the monitoring and management of electricity grids and assets, on securing investment from Nordic investment firm, Summa Equity, acted on the sale of Unity Health Group to Exam Works UK and advised Phenna Group on its acquisition of Environmental Compliance & Services Limited.

Hill Dickinson's strong performance across its corporate offering comes off the back of significant team expansion across all its regions, marking a series of key partner hires, including the recruitment in early 2024 of **James Harmer** in London and of **Nick Dawson** and **Emma Callow** from Irwin Mitchell in order to establish a Birmingham team and, more recently, the arrival in August of **Mark Johnson**, who joined the London team from US firm, Haynes and Boone. There are now over 100 lawyers in the firm's national corporate team.



Ian Riggs

Commenting on the firm's performance, **Ian Riggs**, national head of corporate at Hill Dickinson, said: *"The first half of our financial year has been a dynamic period for the national team, with involvement in a diverse array of UK and cross-border M&A, private equity, and public equity finance deals. Activity has surged over the past couple of months, as teams across all of our offices worked at pace to complete transactions ahead of the October Budget, which introduced significant changes to the capital gains tax regime.*

"We are proud to report that our performance aligns closely with our growth strategy. By securing mandates from a broad spectrum of institutional and owner-managed clients, the total value of deals advised marks a record high for the team at the half-year point. While the pace of transactions has naturally slowed since late October, the pipeline across our corporate teams remains robust. With strong momentum heading into the second half of our financial year, we are confident about continuing to deliver high-quality advice on landmark transactions across all sectors."



Fiona Parry

Fiona Parry, head of business services at Hill Dickinson, added: *"Our corporate team has delivered a remarkable level of activity, showcasing its strength and adaptability in an ever-evolving M&A environment. From high-profile UK deals to complex international transactions, the team has played a key role in helping clients achieve their aims.*

"We've reached a record-breaking half-year milestone, with the total value of deals advised exceeding all previous benchmarks and, as we move into the second half of the year, we remain focused on maintaining this momentum."

- Fiona Parry

What are the plans to reduce the risk of medical negligence?

The National Health Service (NHS) faces increasing financial pressures from medical negligence claims, with compensation payouts rising to £2.8 billion in 2023/24, up from £2.6 billion the previous year, as reported by NHS Resolution. Notably, more than a quarter of these costs are attributed to legal expenses, with the remainder compensating claimants for their pain and suffering and the cost of coping with the injuries they have been left with. This growing financial burden underscores the need for systemic reforms to enhance patient safety and reduce incidents of medical negligence.

The Labour Party's manifesto proposes several reforms aimed at addressing these issues, including modernising medical equipment, enhancing patient engagement, professionalising NHS management, and improving access to primary care.

Modernising Diagnostic Equipment

The Labour Party identifies a dependency on outdated technologies like pagers and fax machines within the NHS, which it deems unfit for current and future needs. It points out that the NHS has fewer diagnostic scanners per person compared to other countries, and many existing machines are outdated. This increases the difficulty for doctors to make timely and accurate scans, thereby increasing the possibility of negligence. The proposed solution is a 'Fit for the Future' fund designed to double the number of CT and MRI scanners, which would reduce the load and facilitate timely diagnoses.

This influx of more modern scanners, some equipped with artificial intelligence, could improve the NHS's capability to detect conditions such as cancer at earlier stages. Early detection is key to reducing instances of medical negligence arising from misdiagnoses or delayed treatments. However, this move would require substantial investment in

both equipment and training, alongside considerations for ongoing maintenance and operational costs.

Enhancing Patient Empowerment

The manifesto also addresses the issue of patient disempowerment within the NHS. Many patients report not being treated with the respect they deserve or receiving inadequate information to navigate the healthcare system effectively. Labour proposes to overhaul the NHS app to put more control into the hands of patients, enabling them to manage their medicines, appointments, and health needs more effectively.

This upgrade will also provide patients with access to performance data on local services and medical guidelines pertinent to their treatment. Improved transparency could lead to better-informed patients who are more equipped to engage with their healthcare providers and make informed decisions. While this could theoretically reduce instances of negligence by ensuring patients receive appropriate care, it might also lead to increased legal claims if services fail to meet the standards patients come to expect.

Professionalising NHS Management

The Labour Party's manifesto recognises variability in the quality and accountability of NHS management. To address these issues, it proposes the implementation of professional standards for NHS managers and the establishment of a Royal College of Clinical Leadership. This initiative aims to regulate managers and ensure that those who commit serious misconduct cannot repeat such actions.

The introduction of professional standards is expected to improve the administration of services across the NHS, reducing administrative errors that can lead to negligence claims. This step could enhance overall healthcare quality, although it will require robust

enforcement mechanisms and could increase administrative overheads.

Reforming Primary Care Access

The manifesto identifies challenges in accessing primary care, particularly in securing timely GP appointments, which is a frequent complaint amongst patients. Labour plans to address this by training thousands more GPs and ensuring that everyone who wants a face-to-face appointment can secure one. They also propose to modernise the appointment booking system to eliminate the common early morning rush for appointments.

By improving access to GPs and ensuring continuity of care, where GPs are incentivised to see the same patients regularly, ongoing or complex conditions can be managed more effectively. This should lead to earlier detection and treatment of conditions, which could reduce the severity of illnesses and the associated treatment costs. However, training and retaining a sufficient number of GPs poses a significant challenge, as does ensuring the effectiveness of the proposed incentives for continuity of care.

Each reform initiative carries potential benefits for reducing legal risks and enhancing patient care. A lack of funding and a failure to modernise have made it harder for doctors to deliver diagnoses and treatment in a timely way. Therefore, a focus on increased financial backing, implementation logistics, and ongoing management and oversight is needed to raise treatment practises to a level which reduces negligence. Engaging stakeholders from healthcare, legal fields, and policymaking is essential to refine these proposals and ensure they contribute to reducing medical negligence within the NHS.

Eddie Jones,
Partner in Medical Negligence
at JMW Solicitors

Solicitors and Law Firms Insurance News:

Specialist Insurance Broker, George Brown provides Solicitors and Law Firms with top tips and advice on insurance. George has a specific focus on Professional Indemnity, including Solicitors Professional Indemnity, which has allowed him to deal with a vast range of sectors and products. George strives to go the extra mile for all of his clients, saving them money without compromising on cover.

Insurance Renewals - What to watch out for:

Over the last 12 months I have experienced first-hand, where law firms have struggled to navigate a renewal process, often due to an oversight, the miscalculation of potential risks or inaccuracy within their renewal terms. Below are a few tips on how to avoid this from happening to you.

Do:

- Carefully select an insurance broker to navigate the complex renewal process with you. Someone who can provide a constructive roadmap to obtaining suitable and competitive renewal terms and explain why particular insurers have been chosen.
- Work on risk mitigation solutions using new technology and 3rd party consultants.
- Agree a marketing strategy with your broker, well in advance of the renewal. Don't be tempted to remarket year on year.

Don't:

- Ignore your claims experience. If there is a trend of claims in probate or large claims noted, then discuss with your broker how these are being resolved and what lessons have been learnt.
- Never leave it to the last minute. Hoping that you will obtain a positive claims experience a week before renewal, as this rarely ends well!

Raising Claim Awareness

Some of the more common claims for solicitors is ID fraud, to the point where the fraudster will meet you face to face with a fake passport. Some firms are also getting caught out in similar situations to the Dreamvar case in 2018. Even though you have known your clients for a number of years, solicitors further down the chain may not have the same strict ID checks that you have.

Some of the leading insurers have also noticed an increase in claims relating to Probate matters and may soon be overtaking conveyancing claims as one of the main risks to law firms. As well as training there are alternative insurance products for this type of work.

The Team at Konsileo:

We are here to provide best advice on your firm's insurance requirements. We work in partnership with compliance advisors and offer cyber risk tools to mitigate risks and raise awareness within your team.

- I will help with the completion of the proposal form to ensure that work splits are accurate and let you know what insurers are looking for on certain sections.
- Our close relationships with insurers let us know what firms they are looking for and where best to place your business.
- We can provide Cyber external scans to test your IT systems.
- Executor & Inheritance insurance to provide separate cover for Probate claims.



George Brown

Client Director

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Liverpool Law Society

Pathways to the legal profession



LEARN ABOUT DIFFERENT ROUTES INTO THE LAW

Organised by the Society's Education & Charities Committee, this annual event informs young people how they can pursue a career in the legal sector.

AIMED AT

- all year 12 students
- at Merseyside schools & colleges
- free, online event

CHAIRPERSON

James Mannouch

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Liverpool Law Society

PROGRAMME

The University route, costs and the benefits of studying for a degree by Lydia Hayes, Professor of Labour Rights at The School of Law & Social Justice at the University of Liverpool

Going into Law having a non-law degree by a tutor at Liverpool John Moores University

The Solicitors' Qualifying Examination (SQE) by Nicola Walker, Campus Manager - Liverpool & Chester at The University of Law

The Legal Executive Route by Lydia Jones, Business Development Representative, CILEX (The Chartered Institute of Legal Executives)

Apprenticeships by Aisling Kiernan, Solicitor Apprentice Programme and Student Lead at the University of Law

Becoming a barrister & life in the Law at the Bar by Emily Land, Barrister, 7 Harrington Street Chambers

Recruiting process for both graduates and apprentices at a law firm by Denise Wright, Early Careers Adviser at Weightmans law firm

A solicitor apprentice's view by a Solicitor Apprentice at Weightmans

Focus on Liverpool Law Society's Rising Star 2024 winner, Toni Williamson



Antonia receiving her award from Mark Evans and Gaynor Williams

I was delighted to be presented with the Liverpool Law Society's Rising Star award at the annual awards dinner on 14th November.

The Rising Star award was open to nominees from all legal backgrounds up to 5 years post-qualification. It was intended to recognise various factors, including the promotion of legal excellence in Merseyside and beyond; evidence of best practice in client service and technical skills; evidence of impact through involvement in professional and charitable bodies; and evidence of going above and beyond day-to-day expectations.

I am a Senior Associate at Freeths. I started my legal career in September 2014, as one of the first cohort of Higher Apprentices at Hill Dickinson's Liverpool office. I joined Brabners in January 2017, and subsequently Freeths in January 2024. I qualified in October 2020.

I took a non-traditional route into the law – firstly by undertaking an apprenticeship, and secondly by qualifying as a Chartered Legal Executive. None of my family members had attended university, and I had no connections in the legal industry.

I am proud of the route I have taken. I have spent 10 years working in this brilliant city, for 3 excellent law firms. I was trained by, and continue to work with, absolutely first-class lawyers. I have had a handful of elitist comments over the years, about my chosen route and qualification – but the vast majority of people have been really kind and supportive.

In my day-to-day work as a family lawyer, I deal with divorce and high-value financial matters, and complex private disputes concerning children. It's an incredibly sensitive area. I pride myself on acting with integrity and I treat all my matters with empathy and respect.

I am Chair of the Merseyside Resolution

committee, which organises regular social and educational events for family law professionals in the region. Resolution is a national body of family law professionals who are committed to handling matters in a non-inflammatory way. It is a misconception that being a good lawyer means fighting every single issue on behalf of a client. In a family law case, where emotions are already running high, that approach can cause matters to escalate and costs to spiral out of control. It is genuinely important to me to take a constructive approach to my matters.

I am the Memberships Secretary for Merseyside Young Professionals ("MYP"), which is a networking organisation for junior professionals in the Merseyside Region. The MYP committee organises regular networking events throughout the year. MYP is the largest junior professional networking organisation in Liverpool; events are hugely popular and well-attended.

I have always been conscious of the importance of providing access to justice. I have volunteered as a supervisor at the LJMU Law Clinic since 2017. I have also accepted direct Pro Bono instructions, with particular focus on assisting women who have been exposed to domestic abuse.

Antonia Williamson
Senior Associate
Freeths

Antonia.williamson@freeths.co.uk



All the winners!

Liverpool Law Society's 2024 AGM



The AGM Panel

The Liverpool Law Society's 197th AGM took place on Thursday 28th November 2024 at the Racquet Club in Liverpool city centre with the then President, Gaynor Williams, opening formal proceedings by welcoming all to the meeting.

As with previous years, the election of vacancies for General Committee took place during the meeting and this year five existing committee members were voted on to continue for a full term of office (three years) were:

- **Mr James Mannouch**, President of Liverpool Law Society
- **Mr John-Paul Dennis**, who is the new Honorary Treasurer
- **Ms Haley Farrell**, Family Business

sub-committee chair

- **Mr Paul Kilty**, Criminal Practice sub-committee chair
- **Ms Jennifer Powell**, Editorial sub-committee chair

And we are delighted to welcome as directors of Liverpool Law Society from the wider membership, a further four directors:

Mr Kevin Donoghue, Ms Nicola Harris, Ms Sally Stanway and Mr Ian Townley.

As most of you will know, Liverpool Law Society is a company limited by guarantee and those elected become Directors with the associated duties owed by virtue of that position.

The committee consists of between 14 and 27 directors and they must retire by rotation every three years with up to five being nominated for immediate re-election.

The outgoing Hon. Treasurer spoke about the Society's accounts ending 31 May 2024. **Dr Emma Palmer** explained "*Much of our income is still drawn from membership subscriptions, training delivery, events, and sponsorships. Membership numbers remain strong, and I'm pleased to report that the payment of subscriptions has been prompt, reflecting the ongoing value our members see in the Society. Training, however, continues to be an area of both challenge and opportunity. The shift towards remote and hybrid*



Jeremy Myers, James Mannouch, Chris Topping



Gaynor Williams, Kevin Donohughe and Haley Farrell

models has affected both delivery and sponsorship opportunities. As remote training becomes the preference for many, we've had to adapt to a new competitive landscape, where training is no longer confined by geography. The Society's Training Forum, launched last year, continues to explore ways to meet this demand and generate income through innovative offerings.

Looking ahead, we are in a strong position to continue evolving. While the immediate challenges are behind us, we must remain vigilant and proactive in seeking new opportunities that will both support our members and secure our future financial health. The Society's ability to adapt, innovate, and deliver on the needs of its members has never been more important."

Finally, the outgoing President **Gaynor Williams** gave her address to the members where she reflected on the past 12 months. Gaynor commented "It has been an absolute honour to serve as your President, in the Society's 197th year. It has been a great privilege to continue the excellent work of so many hard working and distinguished predecessors, including our Immediate Past President, **Jeremy Myers**.

Our AGM gives me an opportunity to update the members about the important work we do as a Society, and to highlight the positive contribution our profession makes to the Liverpool City Region.

Liverpool Law Society is membership led, its purpose is to support members,

because we, as lawyers, are stronger together.

*I want to also say thank you to some people who are stepping down from their roles in LLS. **Emma Palmer**, our Honorary Treasurer, everyone at LLS is very appreciative for the time and hard work she has devoted to the society, she has been an exemplary Treasurer and always brought a smile and positivity to the meetings. I would also like to thank **John Owens**, Director of LLS for his commitment to LLS, and **David Tournafond** who has dedicated 29 years to the society as Director.*

*Finally, thank you for giving me the honour of being President, I look forward to supporting **James Mannouch** next year."*

Personal Injury Conference 2024



Aaron Ocquaye

On Wednesday 4th December, Liverpool Law Society held their annual Personal Injury Conference at Taylor Wessing's stunning offices at Edward Pavilion, overlooking the iconic Albert Dock. The conference was hosted by His Honour Judge Gregory and was attended both in person and virtually. For those of us who were physically present, we were welcomed with hot drinks before taking our seats for the conference's 09:30am start time.

There was an eclectic range of topics covered by the speakers, all of whom were engaging and informative, bringing their own distinct style of presentation. After a warm introduction by **HHJ Gregory**.

Matthew Stockwell of Exchange Chambers kicked us off, providing an update on Catastrophic PI litigation, covering topics such as the need for a collaborative approach during litigation, cost recoverability and considerations given when assessing a party's costs, CCMCs and when and where they can be avoided, considerations made in relation to vulnerable parties and witnesses and the importance of factual evidence as opposed to precedent/case law. Whilst it might be thought it would be difficult to work a **Miley Cyrus** analogy into the talk, Mr Stockwell managed to do so with surprising ease, and even finish with a

seasonally appropriate reference to 'It's a Wonderful Life'.

Dominic Woodhouse of Partners in Costs then delivered his talk on cost budgeting. He first highlighted the importance of filing a budget, to avoid falling short of CPR 3.14 (a party will be treated as having filed a budget comprising only the applicable court fees), before considering risks and opportunities with regards to cost budgets. The case law suggests that proportionate costs will be taken as a range, and even those at the higher end of that range will still be deemed reasonable. Mr Woodhouse also covered proportionality, the risks of overestimating costs, and the issue of parties trying to exploit the budgeting rules for their own benefit. The talk was capped with considerations for future developments which are as yet still in the pipeline.

After a refreshment break, **John Meehan** of Kings Chambers continued the costs theme of the morning with a talk centred around the changes to the fixed costs regime, notably the introduction of the intermediate track which applies to PI cases where the cause of action is on or after 1st October 2023. Mr Meehan explored situations in which Defendants will seek to argue unreasonable behaviour as a means to reduce fixed recoverable costs by 50%. Claimants will also often seek to increase FRC by 50% by employing the same tactic. Mention was also given to the proposed introduction of fixed costs to Clinical Negligence cases, although it is as yet unlikely to appear in the next CPR update cycle in April 2025.

Rounding off the morning's speakers was **Colm Nugent** of Gatehouse Law Chambers who delivered a fascinating (if not fear-inducing) talk about professional negligence, ominously titled 'How not to get sued'. The talk was somewhat of a whistle-stop tour of common situations giving rise to professional negligence claims in PI matters. This ranged from procedural issues such as missing important

court deadlines, instructing the wrong expert for a claimant, under settling by failing to consider and explore all relevant heads of loss, failing to obtain relevant evidence for trial and settling prematurely. A warning was issued against accepting pre-medical offers without explicit and well recorded instructions and for meticulous record keeping and keeping track of what offers may still be live. Mr Nugent's talk was perhaps the most altruistic of the conference, given that his practise somewhat relies on solicitors being negligent in the first place.

After a lunch buffet replete with plenty of sweet treats (thanks **Jo!**) **Jon Radford** of Insurance Fraud Bureau provided a comprehensive overview of the valuable work carried out by the IFB, particularly in tackling criminal gangs conducting 'crash for cash' scams. This was of course pertinent to anybody, claimant or defendant, dealing with RTA cases.

Elahe Youshani of 18 St Johns Street Chambers then discussed all things surveillance evidence. It was noted that Fundamental Dishonesty is increasingly becoming a tool for Defendant Solicitors, and that this often involves the use of covert surveillance evidence to discredit claimants where the alleged injuries would give rise to significant damages. Consideration was given of how to deal with cases where surveillance evidence is being used to support an allegation of FD.

The day was capped by **Louis Brown KC** of Exchange Chambers, who delivered a fascinating and informative talk on cases in which the claimant is suffering from Functional Neurological Disorder.

A huge thank you to **Jo Downey** and the Liverpool Law Society, to **HHJ Gregory** and to Taylor Wessing for what was an all-round enlightening day.

Aaron Ocquaye
Solicitor
Morecrofts LLP



Free Information Sessions for Parents:

A Collaborative Initiative by Liverpool Law Clinic and LJMU Legal Advice Centre

The [University of Liverpool Law Clinic](#) and [Liverpool John Moores University's Legal Advice Centre](#) have joined forces to provide free information sessions for parents considering applying to court for child arrangement orders. With the lack of legal aid available in private family matters, these sessions aim to provide vital information about alternatives to court.

Helenor Birt, Co-Director of Liverpool Law Clinic, highlighted the importance of these sessions: *"I see so many clients who have no knowledge at all about the process, the alternatives, and many have unrealistic expectations of what the court can do. We hope these sessions will really help."*

Liz Jones, from the LJMU Legal Advice Centre, emphasised the dual benefits

of the initiative: *"Public legal education is a really important part of a student's education, and we are confident that our students will get a lot out of being involved in this project."*

The sessions are designed to provide vital information and guidance to parents, covering topics such as:

- Alternatives to court
- Tips on communication
- How to apply to court as a last resort
- Understanding court forms
- Court procedures
- Preparing for court hearings
- How the court makes decisions

The sessions are being held both in person at the University of Liverpool Law Clinic and online, offering flexibility for participants. Each session will last approximately one hour.

Face-to-Face Sessions:

- 26 February 2025, 1pm
- 19 March 2025, 1pm

Online Sessions:

- 22 January 2025, 1pm
- 19 March 2025, 2.15pm

Participants can register online via [Eventbrite](#). For further details, please visit the [Liverpool Law Clinic website](#) or email clinic@liverpool.ac.uk.

This initiative represents an invaluable resource for parents navigating family law issues and offers a practical learning opportunity for law students. Please help spread the word to ensure as many families as possible benefit from these sessions.



CELEBRATION FOR NEW ENTRANTS TO THE LEGAL PROFESSION

LIVERPOOL LAW SOCIETY WOULD LIKE TO INVITE NEWLY QUALIFIED SOLICITORS, BARRISTERS, CHARTERED PATENT ATTORNEYS AND FELLOWS FROM CILEX FROM THE LIVERPOOL CITY REGION AND SURROUNDING AREA WHO QUALIFIED DURING 2024 TO CELEBRATE THE LAUNCH OF THEIR CAREER IN THE LEGAL PROFESSION

WED 29 JAN 2025	RACQUET CLUB CHAPEL STREET, LIVERPOOL
	5.30PM FOR 6PM

WHAT'S INCLUDED?

★ ARRIVAL DRINK ★ CANAPES ★ PROFESSIONAL PHOTOGRAPHY ★ TRAINING VOUCHER

ALL THOSE QUALIFYING WILL BE PRESENTED WITH A CERTIFICATE OF CONGRATULATIONS FROM

HIS HONOUR JUDGE MENARY KC DL
RESIDENT JUDGE & HONORARY RECORDER OF LIVERPOOL

MEMBERS OF THE MERSEYSIDE JLD ARE ALSO INVITED TO BOOK A PLACE TO NETWORK WITH SENIOR MEMBERS OF LIVERPOOL LAW SOCIETY.

THIS EVENT IS FREE TO ATTEND BUT YOU MUST BOOK YOUR PLACE.

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Investing in professional services



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



Julie Johnson

Economic growth is a key target for every sector and layer of government in 2025. From central government to more locally at Liverpool City Region and the city of Liverpool, exploring ways to boost investment and help the economy to grow is what everyone is working towards.

Some sectors need rocket fuel and targeted investment, but are there quiet successes we should be looking to invest in to boost existing strength?

Figures published in the FT this month revealed that professional services have been one of the key drivers for the UK economy, quietly becoming a cornerstone of economic growth. While overall growth slowed to 0.1%, output in professional services, scientific and technical activities grew 0.7%.

In fact the sector - which include law, architecture, research and development, consultancy, market research and other areas - grew by 3.9% in the three months to September compared with the final quarter of last year. That rate is three times the 1.3% expansion of the whole economy.

This is an engine room, and a successful sector which suggests robust



energy to invest in for 2025. Not only is it resilient, but British expertise is widely admired abroad. With fears over what could happen with trade tariffs in the US, professional services could provide a valuable economic buffer.

How to maintain it? At Liverpool BID Company we are exploring ways to channel core investment and promoting the sector. In Spring we will support LCR at MIPIM which will be a valuable tool in telling the story of Liverpool's professional services and corporate sector.

Confidence is key and to help drive the economy forward it is important to ensure we are sharing layers of expertise, from investment, new builds, office moves and the robustness of the sector. Knowledge sharing and information gathering is key and helps to provide the commercial community with insight.

Supporting a successful sector to build on its existing strength can help the city to develop a robust and resilient economy, attracting the next generation of professional services and new investors to the city.

Life in the Law 2025 launch event

Life in the Law 2025 launch

Wednesday 15 January 2025
12.30 to 1.30pm

Learn how you can be part of important research that will shape
the future of mental health and wellbeing in the legal sector

LawCare



Date: Wednesday 15 January 2025

Time: 12.30pm

Sign up here: [Life in the Law 2025 launch event](#)

LawCare is thrilled to announce the launch of the Life in the Law 2025 surveys on 15 January and invites you to join their free launch event.

It's your chance to learn how you can be part of important research that will shape the future of mental health and wellbeing in the legal sector.

The event will include Dr. Emma Jones, Life in the Law 2025's lead researcher from the University of Sheffield, Prof. Richard Collier from Newcastle University, who contributed to the 2021 survey, and members of the LawCare team.

Please share this invite - everyone is welcome to join the event. Book your place here: [Life in the Law 2025 launch event](#)

More about Life in the Law 2025

Life in the Law 2025 is made up of two separate surveys: one for individuals in the legal sector and another for legal organisations, such as law firms, chambers and in-house legal departments.

These surveys will be open to individuals and organisations in the legal sector across the UK, Jersey, Guernsey, and Isle of Man. The research will explore topics such as burnout, mental health and wellbeing, and the future of working practices in the legal sector, building on the 2021 findings.

City Region Skills Development at the forefront of Liverpool Chamber's 175th Anniversary Year



Alison Lobb

Liverpool Chamber of Commerce has represented the businesses of the city since its formation in 1850. Created with the mission *"to represent the commercial interests of the businesses in Liverpool"* and *"to meet and act for a common good"*, the Chamber has endured and prospered for 175 years from its place within the heart of Liverpool's commercial district and community.

The Chamber's anniversary year coincides with a fundamental economic shift under the direction of a new UK Labour government, whose initial policy announcements are creating substantial challenges to the status quo and impacting the outlook of many businesses. The measures announced during the autumn and winter months include changes to employer's National Insurance contributions and minimum wage, as well as a raft of impending amendments to employment legislation.

It was telling that at our recent AGM, of the 40 members of the Chamber present, not one felt that the Chancellor of the Exchequer's budget was business growth-enabling.

Yet whilst the implications of some of the fiscal policy measures are being considered warily by many businesses, there is a recognition that the opportunities presented by greater devolved political power to the Liverpool City Region could be hugely important to the aspirations of our businesses. Having greater funding and control over what to do with it would create opportunities to boost the city region's potential and empower businesses to invest, grow and prosper.

The Chambers of Commerce in the City Region are currently delivering the Local Skills Improvement Plan (LSIP) for the region under contract from the Department for Education. Enabling a stronger connection between our businesses and education providers to ensure an employer-led local skills system has been a worthy objective for some time. With the publication of an LSIP report in August 2023, the City Region has a Roadmap to implement a better collaborative environment which enhances the ability of our colleges, training providers and businesses to be aligned through curriculum content, delivery and partnership.



A key part of the LSIP work at the start of 2025 is the delivery of our Industry Learning Partnership in Professional

Business Services. Developed with the members of the PBS Board on the back of its commissioning of a Baseline review for the sector in Summer 2024 by Edge Hill University, the PBS ILP has already met to review the challenges and opportunities through boosting digital literacy, AI development, leadership and management support and the impartation of life skills to new recruits to the sector.

We will be developing this Learning Partnership to attract additional sector representative employers to help identify the needs and gaps within existing training and education provision whilst ensuring the commissioning decisions made by the Combined Authority factor in the views of PBS sector employers. Further devolved powers could add substantively to the opportunities to develop and co-create training and qualifications which meet our local needs.

We are keen to engage as many law firms through the Liverpool Law Society as possible. Please do engage with the LSIP programme through either the Liverpool, Halton, Knowsley or Wirral Chambers of Commerce.

The LSIP embodies the purposes behind the creation of the Liverpool Chamber 175 years ago, ensuring that the needs of businesses are represented and reflected in the work we do. Developing the talent pipeline for city region businesses is a vital component of our city region's growth aspirations and we look forward to working with Liverpool Law Society members to enhance this objective through the LSIP.

Alison Lobb
Chair,
Liverpool Chamber of Commerce

For further information please email:
membership@liverpoolchamber.org.uk
<https://www.liverpoolchamber.org.uk>

Deborah Biggadike v Kamilia El Farra & Anor [2024] EWHC 1688 (KB)



Summary

The judge found that it was entirely artificial to think that sharing a platform speaking at a seminar during (in the case of one expert) or before (in the case of the other) giving evidence would have any effect or impact on the evidence of two expert witnesses in urogynaecology.

Learning points

Learning points for instructing parties:

- It is best to disclose any potential conflicts of interest mentioned by the experts you instruct, to the court and the other parties, even if they appear minor or tangential.
- You should remind the expert witnesses you instruct of their duties and obligations and make a point of selecting expert witnesses who can demonstrate that they have appropriate training in those duties and obligations.

Learning points for experts:

- Engaging in normal professional activities, such as sharing a platform speaking at a conference or seminar with a colleague acting in the same case, should not by itself cause a conflict.
- Expert witnesses in smaller fields will naturally be aware of most, if not all, other experts and professionals working in their field, and this should not, of itself, cause a conflict.
- Nevertheless, you should disclose any such circumstances to your instructing party.

The Case

The claimant alleged that she underwent a TVT-A tape implantation procedure that would otherwise have been avoided because of breaches of duty by the first defendant. The claimant and first defendant alleged that that a subsequent mesh excision surgery and colpsuspension performed by the second defendant were a breach of duty.

The Experts

Three expert urogynaecologists provided evidence: **Dr Sokolova**, **Mr Robinson** and **Mr Tooze-Hobson**. The integrity of **Mr Tooze-Hobson** and (to a lesser extent) **Mr Robinson** as independent experts was attacked during cross-examination which sought to suggest that they had personal,

professional and/or financial interest in the outcome of the trial and/or had a financial interest in the supply of vaginal mesh products.

Seminar for urogynaecologists

During the course of the trial **Mr Tooze-Hobson** and **Mr Robinson** shared a platform speaking at a seminar for urogynaecologists which had been planned before the trial. Due to changes in the trial timetable, **Mr Robinson** was giving evidence over the weekend of the seminar, while **Mr Tooze-Hobson** was yet to give evidence. Both experts had informed their legal team of this professional commitment but had not informed the court or the second defendant or her lawyers.

The Judge's view

The judge noted that it would have been preferable for this commitment to have been volunteered to the court and the second defendant. However, had it been disclosed, the judge would have done no more than to remind the experts not to discuss the case between themselves, and **Mr Robinson** (who was in the process of giving evidence) that he was prohibited from discussing his evidence with any other person. The judge was able to ascertain that this was in fact how the experts acted.

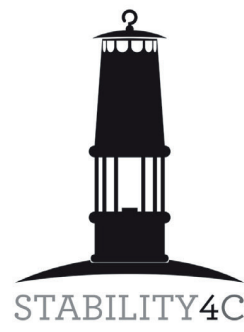
The judge went on to note that the sub-specialism of urogynaecology was a small one. **Mr Robinson** and **Mr Tooze-Hobson** already knew each other and the defendants before the case. She noted that “[i]t is entirely artificial to think that the organisation and attendance at the weekend seminar would have any effect or impact on [the experts’] evidence. **Mr Robinson** and **Mr Tooze-Hobson** had each already provided written reports and then a Joint Statement addressing a detailed agreed agenda. The quality of the substance of their opinion could be and was properly explored through the trial process.”

The judge rejected the suggestion that the experts had approached the task of giving evidence other than in accordance with their duties to the court.

She also rejected any suggestion that either had given evidence that had been improperly influenced by any hidden agenda of protecting personal, professional, or financial interests or had a stake in any particular outcomes in the litigation.

Sean Mosby

<https://ewi-live-portal.azurewebsites.net/News/Case-Updates/author/sean-mosby>



A private company, **STABILITY4C** Ltd began as a way of supporting low-income parents without language or learning difficulties by providing Expert and Professional services they need but could not otherwise afford.

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The latest news from the Equality & Employment Law Centre

At the Equality and Employment Law Centre, we are dedicated to ensuring access to justice for all, actively engaging with our community, and supporting the continuous learning and development of our team. Here's a look at our recent activities and achievements.

Employment and Discrimination Advice Line: A Lifeline for Workers

Our Employment Advice Line continues to experience high demand, providing free, actionable legal advice to those who cannot afford it, do not qualify for legal aid, or whose issues fall outside its scope. Many people who call our free Employment Advice Line have either been dismissed or are facing a workplace dispute such as a grievance or disciplinary matter. This can be very daunting if you do not know your rights and you work for an unscrupulous employer, and sadly, there are many out there. Facing such disputes can lead to health problems, relationship breakdowns, and suicidal ideation. It is not unusual for us to receive a call from a suicidal client on a weekly basis, whose life has fallen apart because they have lost their job or believe they are going to be sacked.

We recently settled a case for a client who called our advice line, unaware of legal aid for discrimination-related employment disputes, and was at his wits' end. The loss of his job resulted in the breakdown of his marriage, homelessness, and suicidal thoughts. He was too unwell to work due to the trauma of losing his job. Through accessing legal aid via our remote telephone service we were able to settle his claim for a significant amount, which restored his faith in justice, vindicated him, and presented him with optimism and hope. He decided to use the money to start his own business. He said of our services *"I'm so sorry that I am unable to control my emotions, thank you for all the hard work you have done. I really feel like you went above and beyond in fighting for me and showed me a lot of empathy."*

In the last year alone, we have made 34% of callers aware of their legal aid entitlement. Without this initial early advice, many people would have not been able to access our legal advice and assistance.



Sarah Doyle, Kristian Khan, Eleanor Mary Silk, Katie Corless, Pam Kenworthy OBE, Julie Ehlen, Hannah McNulty, Eleanor Lovegrove.

Advocating for Workers' Rights

We are pleased to support the new Employment Rights Bill, part of Labour's 'New Deal for Working People,' which is set to come into effect in 2025. This bill promises extensive reforms, including day-one rights for workers, protection against unfair dismissal from the first day of employment, and a ban on exploitative zero-hour contracts. Employers will need to be aware of their responsibilities under this new legislation. However, we believe that these reforms must go beyond the bill itself. Legal aid reforms are required to ensure that employment issues are within scope and that people have access to free employment legal advice.

Celebrating Pro Bono Week

During Pro Bono Week (4-8 November 2024), our Chief Executive and legal team members visited the highly visible Liverpool John Moores Law Clinic for their Pro Bono celebration event. It was inspiring to share stories with partner organizations about the impact of lawyers and law students who volunteer their time to protect the rights of the disadvantaged. The law clinic module, as part of their Law degree, has given students a great insight into social justice law.

Achieving the Specialist Quality Mark

We are proud to have recently regained our 3-year Specialist Quality Mark (SQM), with commendations for our welcoming team, quality legal work, and robust financial governance.

Engaging with the Law Centre Network

Our Chief Executive Officer and Legal Practice Manager attended the Law Centre Annual General Meeting in London. As active members of the Law Centre Network, our team participates

in various groups, contributing ideas and actions on issues ranging from strategic litigation to legal aid reform. There are over 42 law centres across England and Wales. Recently, our colleagues at Kirklees Law Centre won a groundbreaking employment discrimination case against the DWP in the High Court. *Mr R Rimmer v The Secretary of State for Work and Pensions*. We are proud to be part of this network among other social justice champions.

Supporting Legal Apprenticeships and Professional Development

We are passionate about alternative routes to professional qualification. Our Law Centre has successfully supported four members of staff to qualify as solicitors specialising in employment and equality law. Most recently, **Molly Howarth** qualified as a solicitor having completed the graduate solicitor apprenticeship while working full-time. It is a tough route to qualification, particularly in a legal aid practice, and we are proud to say that all our apprentices have qualified with top marks. We are concerned that there are discussions by Skills England to stop the Level 7 solicitor apprenticeship, a move that will particularly jeopardize law centres developing the social justice solicitors of the future. The undergraduate solicitor apprenticeship is also under threat, which allows individuals with no legal training to qualify as solicitors through apprenticeships. Recently, our Chief Executive and apprentice solicitor attended an apprenticeship event at Anfield Stadium, hosted by the Liverpool City Region Combined Authority, regarding the transfer of the apprenticeship levy which we received from QVC, brokered by the Skills Brokerage Team. The event highlighted and celebrated these achievements.

We are also proud of our Legal Practice Manager, **Kristian Khan**, for graduating from the Legal Aid Practitioners Group Management and Leadership Programme. Graduates attended a

symposium at Gatehouse Chambers in London to reflect on their learning and discuss future challenges in the advice sector, including insights on Artificial Intelligence and new perspectives on Equality, Inclusion, and Diversity.

Contributing to Employment

Law Discussions

Two of our solicitors recently participated in an Employment Dispute Resolution focus group organized by the Employment Law Association. The session, which will inform a forthcoming publication, discussed the advantages of Alternative Dispute Resolution in employment disputes and the challenges faced by vulnerable clients, many of whom are digitally excluded. There was also a discussion on changes in Qualified One-Way Cost Shifting in discrimination cases and concerns about court delays hindering access to justice.

Annual General Meeting and Community Engagement

At our Annual General Meeting, we updated our board on the year's achievements and challenges. We also welcomed our local MP, **Kim Johnson**, to discuss the vital services we provide and the challenges we face due to underfunding. We are concerned that while the new Employment Rights Act in 2025 will extend access to justice to over seven million more people, without adequate free advice services, these workers may struggle to assert their legal rights. We strongly advocate for a review of legal aid to include employment claims and support early intervention.

Reflecting on 2024 and Looking Ahead to 2025!

The past year has brought big changes to our team. We are proud of the strong team we have built and that we have attracted a number of highly experienced solicitors from the private sector. Our dedicated professionals are passionate about providing legal advice and support to ordinary people and disadvantaged members of our community facing discrimination or workplace disputes.

Our fight for justice means that in 2024 we have secured a wide range of positive outcomes for our clients. We endeavour to ensure that our clients are compensated for injury to feelings. In one month alone this year we achieved £105,436 in damages for clients. Whilst sometimes a case concludes with a financial settlement, over the past year we have saved clients from eviction, achieved long awaited house moves, secured club

membership discounts as well as employment positions and reasonable adjustments. We strive to achieve not only financial rewards for our clients in the coming year, but reaching goals that can make their lives better, accessible and help them be treated justly and fairly.

Our work goes beyond financial results; it also witnesses firsthand the human and emotional cost that discrimination has on our clients and communities. During the summer riots, law centres were targeted and at risk. However, our teams across the country, with the support of the Law Centre Network, continued to operate our services to ensure that our communities were not prevented from receiving much needed advice on immigration and discrimination.

In November, our senior consultant solicitor **Pam Kenworthy OBE** retired. Pam qualified as a solicitor in 1982. Pam's participation in the Low Commission inquiry on the future on advice and legal support resulted in an OBE for services to Legal Aid. The commission was chaired by **Colin Mackenzie Low, Baron Low of Dalston, CBE**.

Following ten years as a solicitor and partner specialising in personal injury and discrimination law at Thompsons, the trade union legal practice, Pam went into teaching and lectured in Employment Law at both Sheffield universities and Sheffield College. She was also a partner in regional law firm Howells. She specialized in employment and discrimination in the County Court and the Employment Tribunal, a rare skill Pam has been an inspiration to our team and was the supervising solicitor for all of our trainee solicitors and apprentices. Pam has been instrumental in our success and is a font of knowledge on all things legal aid. Pam also worked with us on the research we did with Greenwich University about litigants in person defending their own claims and the inequality of the system. She developed a programme of master classes and training for our team with

funding we received from the LCR Be More programme and the John Moores Foundation.

We celebrated Pam's achievements and reflected on an inspirational life dedicated to improving access to justice. We are pleased that Pam is staying on as a specialist advisor to the Board of Trustees and to deliver masterclass training on the Equality Act to our team. We wish her a well-deserved retirement, although we doubt she will remain still for long!

In the coming year, we aim to expand our services and reach even more people in need. We will be recruiting so please stay tuned for any new posts!

We plan to launch new initiatives focused on early intervention and education for employers so that they are prepared for the new act. Additionally, we are looking to create new partnerships in 2025 to further our mission and enhance our impact. These partnerships will help us expand our legal services and advice for clients, as they often do not present with one straightforward matter.

Get Involved

We invite you to join us in our mission to ensure access to justice for all. Here's how you can help:

- **Donate:** Your financial support helps us provide free legal advice and representation to those in need. Every donation, big or small, makes an impact. Every penny counts in a law centre.
- **Donate Equipment:** Help us by providing necessary IT equipment to support our operations.
- **Spread the Word:** Help us raise awareness about our services and the importance of access to justice. Follow us on social media, share our posts, and tell your friends and family about our work.
- **Visit our [website](https://www.liverpoollawsociety.org.uk)** to learn more about how you can get involved and make a difference today.



Our legal advisor Eleanor Lovegrove with Metro Mayor Steve Rotherham at Liverpool City Region Apprenticeship event

Regulation Update

January 2025

The latest Regulation news from Andrea Cohen of Weightmans LLP



Andrea Cohen

We hope you've had a good break. As always at this time of year, as well as our update on regulatory matters, risk and compliance, and recent disciplinary decisions, we do some horizon scanning and anticipate what's in store for 2025.

Horizon scanning/crystal ball gazing

Our top 10 for 2025, with the caveat that in view of the fast-changing world we work in this list could be out of date by the time it goes to print, is:

- 1. Money laundering regulations**
 Compliance around AML requirements will continue to be one of the key risks for 2025 for firms within scope. As we reported late last year, SRA pro-active supervision doubled in 2023-2024, with only 22% of firms being fully compliant, and enforcement increased by almost 50%, with over £1million fines imposed by the SRA and SDT in relation to AML breaches. That will continue, and we are already seeing the next round of notifications from the SRA regarding inspections, providing 14 days to provide documents and a response to the questionnaire, including requests for copies of any audits with any recommendations or follow up action,
- 2. AML controls in high-risk third countries**
 Keep an eye out for updates on high-risk third countries. Changes to the high-risk third countries list continued to be a trend in 2024, the latest being on 25 October 2024, when Algeria, Angola, Cote d'Ivoire and Lebanon were added to the FATF lists, Senegal was removed but remains on the EU list.

 As a reminder, EDD and enhanced ongoing monitoring is required in any business relationship with a person established in a high-risk third country or in relation to any relevant transaction where either of the parties to the transaction is established in a high-risk third country.
- 3. Sanctions regime**
 The [UK sanctions list](#) continues to grow, with countries and individuals being added on an almost daily basis. Following on from its survey mid-2024, the SRA identified a number of issues, including lack of written sanctions FWRA (not compulsory, but considered best practice by the SRA, particularly for firms at higher risk), identification/verification controls and failure to screen against designated persons lists. It confirmed that its data collection, risk profiling and proactive inspection will extend to compliance with financial sanctions.
- 4. Economic Crime**
 Large organisations have until
- 5. Consumer protection**
 The SRA consultation on consumer protection, covering a wide range of areas, including changes to the way firms hold client money, interest earned on client money, compensation fund changes, Accounts Rules changes etc. ends on 21 February. The Law Society and local law societies will be responding, and we would encourage solicitors and firms to review and respond to the consultation.
- 6. Cybersecurity**
 Law firms are a target for cyber criminals as firms regularly handle commercially sensitive and confidential information on behalf of clients and act on transactions involving the transfer of significant funds. The SRA AML annual report 2024 recognised this as an emerging risk, both on a firm's own IT systems but also within the law firm's supply chain, which might have serious knock-on consequences to a firm's operations. Is there anything else you can be doing now to either prevent attacks or, in the event that you do suffer a successful attack, put you in the best position possible to respond effectively, minimise any damage, and avoid the emerging risks flagged by the SRA?
- 7. Use of technology**
 Firms need to be aware of the use of technology, and particularly AI, and

1 September 2025 to develop and implement reasonable fraud prevention measures, failing which they could face investigation, prosecution and an unlimited fine.

The LSB consultation on proposed draft guidance regarding how legal regulators can fight economic crime runs until 7 February 2025. It is anticipated the new legislation may lead to an increase in SRA inspections, investigations and enforcement. Following the consultation that ended on 20 September, the SRA's decision is still awaited on its proposals on financial penalties, in light of its new powers to issue unlimited fines for certain breaches of its rules under the ECCTA.

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Firms need to be aware of the use of technology, and particularly AI, and

potential risks relating to data privacy, client confidentiality etc. Consider what systems and processes you have in place to meet changing standards and protect reputational risk. As yet, there is no regulatory guidance or legislation, but there is likely to be in the future and this should be on a firm's radar.

8. Implications of Axiom Ince report and other firm failures

Firms should be aware of potential ramifications from findings of missed critical opportunities by the SRA, failure to heed warnings, failure to adequately assess risks associated with acquisitions, and SRA's oversight of client accounts. This may lead to increased regulatory obligations, inspections and interventions, and, as raised in the SRA consultation referred to above, a move away from client account to third party managed accounts.

The LSB stated this has shown the importance of lawyers demonstrating and maintaining professional ethics, and the area 'clearly needs significant attention if the profession is to uphold public confidence'. It is set to consult on suggestions to uphold and support ethical decision making throughout the profession, with the 'longer-term ambition is for improved awareness among all lawyers and their lay colleagues of the ethical responsibilities of the legal profession, and for strong professional and regulatory support for the maintenance of those responsibilities, sometimes in the face of unreasonable pressure. This will be a major undertaking, requiring collective action.' It pledged to focus on how consumers may be put at risk by the developments in the legal market, such as growth in third-party litigation funding, the failure of large law firms and group claims.

9. Wellbeing within firms

With the introduction of The Worker Protection (Amendment of Equality Act 2010) Act 2023 which imposes a duty on all employers to take all reasonable steps to protect their

workers from sexual harassment by other workers or third parties, which includes clients, there is a clear overlap with the SRA Standards and Regulations (paragraph 1.5 of the Code for Solicitors and 1.6 of the Code for Firms, requiring solicitors and firms to treat colleagues fairly and with respect, and to not bully, harass or discriminate unfairly against colleagues), and firms will need to ensure a risk assessment is carried out, review existing policies/draft new policies, provide training etc.

10. Continuing competence

In its annual assessment of continuing competence, the SRA indicated an increase in reports in a number of areas, including Family and Landlord and Tenant law, and will be looking into if and how solicitors in these areas are maintaining their competence. The SRA have begun to ask solicitors to submit continuing competence records during investigations.

Accountants' reports – spot checks

The SRA announced it would initiate spot checks to ensure firms are obtaining an annual accountant's report, as the number submitted to the SRA each year is falling, the requirement to deliver a report having changed to only those who receive a qualified report. The SRA did acknowledge that that may mean firms are more compliant but 'could also suggest there are issues to address'. The COFAs of selected firms received an email two weeks before Christmas advising an online questionnaire would be sent in January. The questions not only relate to the report, but also ask about reviews of residual balances, percentage and total of current matters which have residual balances, total value, largest value, length of oldest residual balance, and work category with largest total value. The perfect Christmas present! It has been asked why this could not wait until the start of the year.

New practice notes and guidance

The Law Society has published the following updated guidance since our previous update:

- Money Laundering Risks and Threats | [Money laundering risks and threats | The Law Society](#)
- Adequate consideration and proceeds

of crime | [Adequate consideration and proceeds of crime | The Law Society](#)

- Economic Crime and Corporate Transparency Act | [Economic Crime and Corporate Transparency Act | The Law Society](#)

Disciplinary and regulatory decisions

While quieter than usual, there have been a few interesting decisions and judgments reported since our last update, including: AML breaches

In the first two weeks of December, the SRA reported that it had imposed fines of a total of nearly £100,000 on 8 firms for breaches of AML, including failures to have any/any compliant FWRAs, PCPs, records etc. in place.

Struck off for unverified legal aid claims

A legal aid solicitor who was unable to prove her firm made hospital visits claimed for, was unable to record client money and did not return monies to all clients, has been struck off and ordered to pay £65,000 costs. The SDT stated: 'The ongoing inability to rectify and remedy these serious breaches of the rules to ensure compliance was a comprehensive failure to meet fundamental professional obligations which could only be described as manifest incompetence.'

Struck off for forging client signature

A 44 year PQE solicitor who forged her divorce client's signature on a replacement notice of severance, having lost the original, has been struck off. The replacement was sent to the client's husband, who, not recognising the signature, refused to sign it and a complaint was made to the SRA. The SRA described the misconduct as 'deliberate and planned to conceal the fact the original document was lost'.

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

Charity Spotlight: Claire House



Charlie's Story

'We would be lost without Claire House'

Charlie, 14, suffers from a series of complex medical conditions. Thankfully, his family have Claire House Children's Hospice to rely on.

"We had no idea Charlie had any complex health problems when he was born," shares mum Shirley from Anfield, Liverpool.

"For the first four months, he was developing normally, he was lifting his head up and doing everything you would expect.

"Then he had his first seizure."

After initially being told that it was just a fever, the hospital diagnosed Charlie with a rare brain disorder called Lissencephaly that affects his feeding and swallowing. *"He can't walk or talk or sit up,"* says Shirley.

"After his diagnosis, Charlie continued to have seizures and the development we had seen in him just stopped."

Charlie requires 24-hour round-the-clock care and when he was five years old, the family were referred to Claire House, which supports seriously and terminally ill babies, children and young adults.

"Charlie is a lovely boy, he has such a big personality," Shirley says. "He enjoys lights and music and especially loves being around people. But it can be a lot.

"You never get a middle with Charlie. He can be happy, chilled and sleepy or he can be very unsettled. On those days, he is loud and can cry for quite some time."

Shirley and Charlie's dad Lee rely on



support from Claire House, which has a site in West Derby offering daycare, complementary therapies, clinics, play and music sessions, and counselling, as well as a full hospice in Wirral.

"Charlie's grandparents have always been hands-on and used to sometimes have him overnight. But they are in their 70s and he would just be too much for them to have now.

"We can go night after night where he just will not sleep. It can be so exhausting," Shirley explains.

"There have been nights where I have sat on the end of the bed and just cried because I don't know why he won't sleep or why he is in pain.

"I have emailed Claire House in the early hours because we need their support.

"We don't always expect them to help, because we know there are more families who need them, but they will always try to accommodate us where they can."

Charlie goes to Claire House for both planned and emergency respite stays.

"We would be lost without them," says Shirley. "There is no-one else I would trust to look after Charlie.

"When he comes to Claire House, we know Charlie is well looked after, and he loves being involved in all the activities.

"At Claire House, every day is different for Charlie.

“He can go for days out that we would struggle to do, he can be part of a musical session or do crafts in the art room. All Charlie wants is to be included in whatever is happening at the hospice.”

“And the team are like family. We can talk about anything and they are amazing with Charlie.”

For Shirley and Lee, respite stays offer a much-needed break.

“When Charlie is at Claire House, we can recharge our batteries and finally sleep.”

“We can do the things we don’t often get to do. Lee and I can go out for dinner with Charlie’s older sister Beth or go out just the two of us, which doesn’t happen often.”

“The hardest thing during this time is deciding whether to go out every day or sleep!”

In the eight years they have been supported, Claire House has offered Charlie and his family additional support at crucial times.

“If it wasn’t for Claire House, I don’t know where we would be,” says Shirley.

“Charlie’s condition means he suffers with chest infections, which has led to a lot of hospital stays.”

“When he has been discharged, Claire House has really helped with step down care to make sure that transition back home is easier.”



“Whenever he has been in hospital for a few weeks, they are always there to help afterwards.”

The charity has also helped the family to make special memories.

“We have been so fortunate to have a number of treasured memories because of Claire House,” says Shirley.

“But for me, the one that always comes back to me is when they arranged for us to switch on the Christmas lights at Cheshire Oaks. We were made to feel like celebrities and Charlie was the superstar!”

“He loves lights and to be able to switch those lights on, it was truly special and something that will stay with me forever.”

Claire House helps seriously and terminally ill children from Merseyside, Cheshire and North Wales live life to the full by creating wonderful experiences and bringing back a sense of normality to family life.

By providing specialist nursing care and emotional support, Claire House helps families smile again when life couldn’t get any tougher.

Offering care whenever and wherever it’s needed, the hospice provides various therapies, day care, short breaks, counselling and end of life care. Claire House offers parents some desperately needed time off with the peace of mind that their children are being well looked after. The hospice provides someone to talk to and specialist counselling and family support.

Families also get a chance to get to know each other and meet with other people going through similar experiences through days out, experiences and support groups.

You can find out more about Claire House by visiting clairehouse.org.uk or call 0151 343 0883.

Forthcoming Courses

DATE	EVENT	SPEAKER
03 & 05/02/2025	Personal Injury Trusts	Helen Forster
06/02/2025	Economic Crime and Corporate Transparency Act 2023 - a focus on looming Identity Verification	Jackie Sheldon
11/02/2025	The 2025 Housing Conditions Conference	Various
03/03/2025	Financial Orders: Law & Practice	Safda Mahmood
03/03/2025	Cohabitation: Law & Practice	Safda Mahmood
04/03/2025	Introduction to Private Client work	Rebecca Roscoe
06/03/2025	International Women's Day event	Various
10/03/2025	Inquests and Coronial Law	Nichola Halpin & Gareth Thompson
11/03/2025	SRA Accounts Rules Update	Linda Lambert
12/03/2025	Domestic Abuse Conference	Various
14/03/2025	Civil evidence and witness statements	Mike Winston
18/03/2025	Conveyancing Law Update	Richard Snape
19/03/2025	Costs Conference 2025	Various
20/03/2025	Directors Duties - the fundamentals (inc the new voluntary code of conduct)	Jackie Sheldon
25/03/2025	Practical Probate: The Works	Rebecca Roscoe

*** Training events open to legal professionals nationwide ***

ONLINE events are recorded, so if you can't make the date/time, no problem!

Booking onto any of our online events means you will receive a link to access a recording of the event to watch at your leisure!

To comply with the SRA's [Code of Conduct for Solicitors, RELs and RFLs](#), all solicitors must keep their professional knowledge and skills up to date. these courses will help you maintain an up-to-date understanding of relevant law, policy & practice.

For full details or to book any of the above courses (& more!) please visit:

<https://www.liverpoollawsociety.org.uk/training/>



Newbuild Conveyancing: Trips & Traps

with Richard Snape

'Live' online 22nd January, 1.30pm - 4.30pm

This online course will look at some of the many issues relating to newbuild conveyancing, primarily for the buyer and some other problems which may arise together with their solutions.

Topics covered include:

- ◆ NHBC and similar schemes including the future of newbuild guarantees under the Building Safety Act 2022
- ◆ Planning issues including S.106 agreements, planning conditions and Community Infrastructure Levy
- ◆ Drainage issues
- ◆ 38 Highways Agreements
- ◆ Enforceability of positive covenants in freehold land
- ◆ Building regulations
- ◆ Building Safety Act issues
- ◆ Enforceability of restrictive covenants and advising the client
- ◆ Reporting to the Lender

[**CLICK HERE TO BOOK**](#)



Law Firms: How to immediately make more money, fix your cashflow, convert more enquiries & bring in more work

with Jay Sahota

'Live' online, 23rd January, 9.30am - 12.45pm

A must-attend for all managing and senior partners, managers, heads of department, heads of training, practice managers & FDs

This online session from the Masala Mentor, a solicitor & previous law firm owner and seller, will show you, in 3 sections, how to:

- Instantly improve your firm's cashflow, with lots of detailed golden nuggets – some of which only experience can buy!
- How to improve your value and self-worth, enabling you to charge more with confidence so that your clients pay you happily
- Make more money via better billing; convert better; get more work from existing clients; and bring in copious amounts of work via networking

[**CLICK HERE TO BOOK**](#)



Introduction to Wills and Probate, and Connection with Family Law

with Safda Mahmood

'Live' online 29th January, 10am - 4pm

This online course will equip you with the essentials in terms of principles of wills & probate, and as to how it links into other areas of law, particularly family law. It will be of benefit to those delegates who seek to get an understanding of this area of law.

The areas to be covered are:

- Requirements For A Valid Will
- Capacity And Formalities
- Witnesses And Types Of Gift
- Making Changes To Wills
- Revising And Revoking Wills
- Clauses To Assist Children
- Family Provision Claims
- Divorce, Dissolution And Wills
- Intestacy And Contentious Probate
- Introduction To Probate And Administration
- Grants And Carrying Out Probate



**** [CLICK HERE TO SEE FULL DETAILS](#) ****



The latest on the SQE & Trainee Programmes: Roundtable with The College of Legal Practice

Online, Friday 31st January, 1pm - 2pm

The College of Legal Practice has been working with firms since the introduction of the SQE in 2021 to design and deliver their SQE & trainee programmes. Join this discussion to hear the latest on the SQE, what is working well and how other firms have approached SQE.

This roundtable is for Legal HR & L&D colleagues, and anyone involved in supervising or managing trainees within their organisation.

The College team will share with you their insight into the SQE exams and key factors for candidates performing well. They will highlight example programmes from client firms and talk through the latest on the Graduate Solicitor Apprenticeship Programme and possible alternatives.

THIS ONLINE SESSION WILL NOT BE RECORDED

Free for Members / £10 for Non-Members.



[**CLICK HERE FOR MORE INFO**](#)



Personal Injury Trusts

with Helen Forster

'Live' online, 3rd & 5th February

Personal injury trusts are a niche area full of traps for the unwary. These live & interactive sessions will explain when and how you should advise your clients to consider the founding of a personal injury trust, how to draft them, the problem areas and practical advice and guidance.

What You Will Learn

- A reminder of personal injury trusts
- What is a personal injury trust?
- When are they required?
- When can they be set up?
- What can a personal injury trust obtain for the compensated person?
- Types of personal injury trust
- Financial advice and investment of personal injury awards
- Personal injury trusts and the Court of Protection – applying for a PI trust for 'P'



& more...

[CLICK HERE TO BOOK](#)



NEW Economic Crime and Corporate Transparency Act 2023 – a focus on looming Identity Verification

with Jackie Sheldon

'Live' online, 6th February, 1pm - 2.30pm

This online course is appropriate for anyone involved in advising UK companies or conducting filings at Companies House.

Covering:

- The fundamentals of identity verification, including who will have to verify, how they will verify, consequences for failure to verify (and why verification is being introduced)
- Useful methods to brief clients and how to prepare for the process internally
- Outline implementation plan (reflecting current proposed dates for identify verification)
- Authorised Corporate Service Providers (and what they will need to do to verify on behalf of clients) including internal risk considerations
- Q&A.

[CLICK HERE TO BOOK](#)



Financial Orders: Law & Practice

with Safda Mahmood

'Live' online 3rd March, 10am - 12.30pm

This online course will consider the various factors surrounding financial orders and the developments in the case law and statutory provisions. It will be of benefit to those delegates who seek to be aware of the current themes and developments surrounding this area of law.

The topics covered will include:

- Case Law Developments
- Short Marriages and High Wealth Cases
- Periodical Payments and Maintenance Pending Suit
- Inheritance, Gifts and Barder Principles
- Cohabitation Cases
- Conduct Arguments
- Pre and Post Nuptial Agreements
- Material Non – Disclosure
- Bankruptcy and Financial Orders
- Key aspects surrounding Procedure

[CLICK HERE FOR MORE INFO](#)



Cohabitation: Law & Practice

with Safda Mahmood

'Live' online 3rd March, 1pm - 4pm

This online course will consider the various factors surrounding advising cohabitants in family law matters. The developments in this significant area of law will be considered with emphasis of the leading case law and statutory provisions. It will be of benefit to those delegates who seek to become more confident with how to run/defend a case through the courts involving trusts of land and Schedule 1 Children Act Matters.

The topics covered will include the following:

- **Joint Tenancies and Tenancies in Common**
- **Resulting and Constructive Trusts**
- **Trusts of Land and Appointment of Trustees Act 1996 – Applications**
- **Proprietary Estoppel**
- **Drafting and Procedure**
- **Practice following Stack v. Dowden, Kernott v. Jones and Barnes v. Phillips**
- **Consideration of Hudson v Hathway 2022**
- **Schedule 1 Children Act Applications and developments**
- **Case law Update**

[CLICK HERE TO BOOK](#)

Welcome Jackie!



Jackie Sheldon

Liverpool Law Society is delighted to introduce a new speaker to our programme; Jackie Sheldon (LLB (Hons), PGDip (Law), FHEA, PGCPE, CMBE)

Jackie qualified and practised as a corporate solicitor in a large City firm before moving to the North West where she worked at two commercial firms including Hammonds where she specialised in advising on corporate acquisitions.

She has been teaching for over 18 years, is a Fellow of the Higher Education Academy, has a Post Graduate Certificate in Professional Education and is a Certified Management and Business Educator.

Jackie has also co-authored a book: 'Advising Effectively on the Employment Aspects of a Corporate Transaction - A Practical Guide for Junior Lawyers', Law Brief Publishing, 2021.

In her spare time, Jackie runs a martial arts school in the North West, has two blackbelts in kickboxing (and is working on earning a third), has recently become a Coach Educator for England Boxing and enjoys spending her time walking in the Peak District with her giant (daft) dog and hanging out with her husband and sons.

Some of the first events we will be holding with Jackie are;

Economic Crime and Corporate Transparency Act 2023 - a focus on looming Identity Verification ~ 6 Feb, 1pm till 2.30pm

The Economic Crime and Corporate Transparency Act 2023 received

Royal Assent on 26 October 2023 and is being implemented in phases. A looming phases is that of identity verification, impacting everyone who owns and/or manages a company in the UK together with those who file documentation at Companies House on behalf of companies and clients. This online course is appropriate for anyone involved in advising UK companies or conducting filings at Companies House.

[Economic Crime and Corporate Transparency Act 2023 - a focus on looming Identity Verification \(online\) | Liverpool Law Society](#)

Directors Duties - the fundamentals (incl the new voluntary code of conduct) ~ 20 March, 1pm till 2.30pm

The Institute of Directors launched a voluntary Code of Conduct ("Directors Code") on 23 October 2024. Directors appointed to the board of a private company in the UK now have even more complex considerations while navigating their role.

This online course will cover the key company law implications when accepting an appointment as a UK director, including a full refresher on the statutory duties of directors under the Companies Act 2006 as well as discussing how best to brief a new director for their role and considering the implications of the new Directors Code.

[Directors Duties: the fundamentals - incl the new voluntary code of conduct \(online\) | Liverpool Law Society](#)

This course is appropriate for trainee solicitors, apprentices, paralegals, newly qualified solicitors or anyone involved in the appointment of a new director of a private UK company.

For full details & to book see: [Company & Commercial Archives | Liverpool Law Society](#)



2025 Housing Conditions Conference

Tuesday 11th February 2025 - attend in-person or online!

Are you a legal professional working in the housing sector? Whether you represent tenants, landlords, or both, this Conference is the premier event to deepen your expertise, exchange insights, and stay informed on the latest developments in housing law and property rights.

To be chaired by DJ Michelle Campbell & with confirmed speakers; Steven Bletsoe, Alana Davies, Jonathan Davidson, Louise Murphy, Ben Reeve-Lewis, Thomas Stockton & Hayley Webster

Kindly sponsored by  More details coming to the website soon...

[CLICK HERE FOR MORE INFO](#)

The Great Wealth Transfer: Challenges, Opportunities, and Solutions for Lawyers and Accountants



Large estates can push individuals into higher tax brackets due to inheritance taxes and capital gains, fundamentally changing their financial profiles. Beneficiaries who were previously non-taxable may suddenly face substantial tax liabilities, which can complicate the transfer process.

Lawyers will need to ensure that estate plans are designed to account for future wealth transfers and tax implications. Similarly, accountants must help clients manage tax changes by implementing strategies such as gifting assets, creating trusts, or making charitable donations to reduce tax burdens.

Opportunities for Lawyers

1. Expanded Estate Planning Services

The scale of wealth being transferred presents law firms with an opportunity to expand their estate planning services beyond basic will drafting. Clients will need more comprehensive planning that addresses long-term tax implications, asset protection, and anticipated future wealth. Lawyers can engage clients in conversations about potential inheritances, ensuring that their estate plans account for both current and future assets.

By taking a proactive, holistic approach to estate planning, lawyers can position themselves as key advisors, guiding clients through the complexities of managing wealth transfers.

2. Cross-Departmental Collaboration

Estate planning frequently overlaps with other legal areas such as tax law, family law, and business law. This creates an opportunity for law firms to foster collaboration between departments to provide clients with seamless and integrated legal services. By working together,

Understanding the Great Wealth Transfer

The “Great Wealth Transfer” refers to the historic shift in wealth we are witnessing now, and over the coming decades. Experts estimate that over £5.5 trillion will be passed down before the end of 2050, making it a significant event in financial and estate planning.

At the centre of this significant wealth transfer are baby boomers, born between 1946 and 1964, who are expected to pass their accumulated wealth to Generation X (born 1965–1980) and Millennials (born 1981–1996). On average, individuals inherit wealth at the age of 58, which means we are at the cusp of this massive wealth shift.

This wealth transfer brings unique challenges, but also numerous opportunities for legal and accounting professionals to assist clients in estate planning, tax strategies, and financial management.

For legal professionals, the wealth transfer creates an increasing demand for drafting complex wills, trusts, and long-term care plans due to larger estate sizes. Accountants, on the other hand, play a critical role in advising clients on how to minimise tax liabilities while efficiently managing wealth transfers.

Challenges faced

1. Generational Communication Gaps

One of the greatest challenges lawyers and accountants will face during this Great Wealth Transfer will be facilitating conversations between different generations about sensitive issues like inheritance and death. Baby boomers tend to be more reserved about discussing financial matters, while Millennials and Generation Z are more comfortable with digital communication but may lack the experience to navigate face-to-face discussions about complex family financial dynamics.

Lawyers must encourage open conversations about estate planning with their older clients. Often, baby boomers are reluctant to discuss wealth and death due to cultural norms, making it necessary for lawyers to create an environment where clients feel comfortable sharing their goals. Accountants face similar challenges when discussing wealth transfer strategies, particularly with clients who may not have been proactive in financial planning. Financial literacy among the younger generations also poses challenges, as they may not fully grasp the complexities of managing inherited wealth.

2. Complex Tax Planning

A significant concern in wealth transfers is the potential tax burden on beneficiaries.

different departments can ensure that clients' legal and financial needs are comprehensively addressed, enhancing the firm's reputation and client satisfaction.

3. Client Retention and Engagement

Assisting clients through the wealth transfer process can help law firms build long-term relationships with clients and their families. Regularly reviewing estate plans and keeping clients informed about potential changes in their financial situations not only fosters trust but also solidifies the lawyer's role as a valuable advisor.

Engaging younger generations, who will eventually inherit wealth, is also critical. By helping them understand estate planning, lawyers can establish lasting relationships that extend beyond the initial wealth transfer.

Opportunities for Accountants

1. Tax Planning and Wealth Management

The wealth transfer offers accountants opportunities to provide essential tax planning and wealth management services. As clients inherit wealth, they will need advice on managing it efficiently while minimising tax liabilities. Accountants can help clients use trusts, gifting strategies, and other tools to ensure that wealth is transferred in a tax-efficient manner.

Additionally, accountants can advise clients on how their financial profiles will change post-inheritance, helping them restructure investment portfolios to account for new assets and minimise tax exposure.

2. Estate and Succession Planning

Collaborating with lawyers, accountants can provide comprehensive estate and succession planning services that account for tax consequences, family dynamics, and long-term financial goals. This collaborative approach ensures that clients are well-prepared for the financial and legal implications of wealth transfers.

The Role of Estate Planning Technology

Modern estate planning technology plays a crucial role in helping lawyers and accountants manage the complexities of the Great Wealth Transfer. From automating document drafting to improving client communication, legal technology enhances efficiency and provides real-time insights for informed decision-making.

1. Automation and Efficiency

Estate planning technology enables automation of tasks such as drafting estate planning documents and managing client data. Automated workflows ensure that all necessary steps are completed, reducing errors and streamlining the estate planning process.

2. Improved Client Communication

Estate planning software enhances communication between lawyers and clients by providing secure, online access to important documents and information. Younger generations, in particular, appreciate the convenience of digital communication over traditional face-to-face meetings. Additionally, modern software suppliers like LEAP Estates fosters collaboration between departments within a law or accountancy firm, ensuring clients receive integrated and comprehensive services.

3. Data Management and Analytics

As the amount of wealth being transferred increases, managing client data effectively becomes critical. The latest software with advanced analytics capabilities allows professionals to analyse trends, predict outcomes, and make more informed decisions. Predictive analytics can help firms identify clients who may benefit from estate planning services, allowing professionals to offer tailored advice and enhance client retention.

Extra Considerations for Lawyers

As the value of estates increases, there is a growing likelihood of disputes among beneficiaries, particularly in high-value cases. Lawyers need to be vigilant in

documenting clients' intentions clearly and ensuring that estate plans are updated regularly to reflect changes in financial circumstances. Estate disputes can be emotional, especially when family homes or sentimental assets are involved, adding complexity to estate planning.

Lawyers must also stay informed about changing tax laws, such as the potential removal of certain exemptions. Changes in tax policy may require clients to sell properties to meet inheritance tax obligations, leading to emotional and financial challenges. Educating clients on the benefits of proactive estate planning is key to minimising disputes and ensuring smoother wealth transfers.

Conclusion

The Great Wealth Transfer presents significant challenges and opportunities for legal and accounting professionals. While generational communication gaps and complex tax planning pose difficulties, the vast wealth being transferred offers professionals the chance to provide valuable, comprehensive services. By leveraging technology and focusing on long-term client relationships, lawyers and accountants can position themselves as trusted advisors, guiding clients through the largest wealth transfer in history. Estate planning software, in particular, will play a crucial role in streamlining processes, improving client communication, and ensuring that firms can manage the complexities of this wealth transfer efficiently and effectively.

Craig Matthews
CEO, LEAP Estates

About LEAP Estates

LEAP Estates occupies a unique position in the legal software market, providing specialist software for probate solicitors and estate planners.

For more information, please visit www.leapestates.co.uk or follow LEAP Estates on [LinkedIn](#).

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Social Media Highlights

Each month we will be bringing you a selection of the latest social media posts by Liverpool Law Society and its members.



If you have an interesting story to share, why not send it to us, clearly labelled 'Social Media Page':
editor@liverpoollawsociety.org.uk

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