

February 2025

Liverpool Law

Liverpool  Law Society

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

Society celebrates the future of the legal profession

NQ Evening report on page 20



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February 2025

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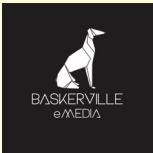
Liverpool Law Society Magazine is produced by and for Liverpool Law Society Members. This is our opportunity to share our news, events and celebrations with our friends in the legal community.

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

Photographs should be provided in the highest resolution possible to ensure a good reproduction. Photographs must not be subject to copyright.

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

Published by Baskerville eMedia
Merseybank Business Centre
55-57 Seabank Road, Wallasey
Merseyside CH45 7PA
Tel: 0151 203 0440
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Editorial Committee Dates 2025

Meetings start at 01.00 pm.

- Mon, 17 Feb 25
- Tue, 18 Mar 25
- Mon, 14 Apr 25
- Tue, 20 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 February edition of Liverpool Law



We have had a busy month here at LLS and have been honoured with Freedom of Association by Liverpool City Council, in recognition of the work carried out in our legal community. Further details are contained on page 39 but there will be more to follow once the celebration plans have been set to align with the Bicentenary year in 2027.

The NQ event has also taken place and we have lots of photographs from the night. I was unable to attend the event this year but always enjoy meeting the NQs and celebrating their success and some individual awards too. I think it is so important to engage with, and listen to, our new intakes- there is always room to learn. I am an example of this- from attending this very event myself a few years ago and having such discussions prompted my move to my current role. Congratulations to them all and I look forward to seeing them feature in our pages in the near future.

Our spotlight this month is on our Deputy Vice President, **Alum Ullah**. Alum has been a great support of the magazine and I often dub him our 'Chief photographer'. He is always at every event, encouraging others to attend and ensuring the perfect photographs for the magazine- thank you Alum. I have no doubt he will be amazing in his new role.

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 7 individuals from the following organisations:

- Bond Turner
- CEL Solicitors
- Hill Dickinson
- Phoenix Legal
- Samuels Law
- Weightmans

Liverpool Law Society's membership now exceeds 2,440 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 the President, James Mannouch

It's been a busy start to 2025 here at the Society.

The final event of 2024 was the Christian Lawyer's Fellowship Carol Service held at **Our Lady and Saint Nicholas** on 17 December. **Gaynor Williams** read a lesson, as is customary for the Immediate Past President and **HHJ Adrian Bever** gave a thought-provoking speech about the meaning of Christmas and its role within the Christian calendar. Our Lady and Saint Nicholas is the Parish Church of Liverpool, and its location places it at the heart of the Liverpool legal community. Following the service (replete with full brass band!) there was an opportunity to mingle, and I noted several past presidents serving the mince pies and mulled wine. What a wonderful end to the year.

2025 will present its own challenges and uncertainties and it is incumbent upon us as a profession to respond. Law firms 'sell time' and around three-quarters of practices employ people in the process of doing so. This means business costs will rise for most firms from April as National Insurance rates increase from 13.8% to 15%, and the earnings threshold at which firms start paying this tax drops significantly from £9,100 per year to £5,000. Together, these changes will negatively impact margins. Allied to this, costs will rise for business clients, and this has the potential to place pressure on revenues.

So, is there any cause for optimism? Overall, the legal services sector has recently enjoyed a decade of growth. The Law Society's Economic Value Report (<https://www.lawsociety.org.uk/topics/research/economic-contribution-of-legal-services-2024>) determined the legal sector's turnover to be £44bn in 2022, a 45% increase since 2012. The majority (53%) of this revenue is derived from outside of London, and LLS member firms continue to play an important role. As we turn the calendar into the second half of the decade, it is perhaps a good time for firms to consider their offering. Has a firm's market remained the same since 2020 or has it changed? If the latter, then it is incumbent on managers to understand the changes and adapt accordingly. Likewise, what new opportunities will the next five years present? Legal practitioners are adept at evolving and ensuring their practice remains relevant, and I see no reason why this should change. LLS continues to support firms and individuals through its acclaimed professional training program (<https://www.liverpoollawsociety.org.uk/training/>), with significant discounts available to members.



One area of legal practice that has changed significantly over the past five years is the route to qualification as a solicitor. The Legal Services Board approved the Solicitors Qualifying Examination (SQE) in Autumn 2020, some nine years after consultation began. The SQE came into effect a year later and has grown every year since. July 2024 witnessed five thousand candidates sit the first set of examinations. My reason for mentioning this is that, as I write this column, I am looking forward to attending the annual Celebration of new entrants to the legal profession on 29 January 2025 at the Racquet Club, sponsored by the **University of Law**. **His Honour Judge Menary KC DL** has kindly offered to present the Certificates to the newly qualified lawyers and professionals, with the **Lord Mayor, Cllr. Richard Kemp** presenting the academic prize-winners. I am looking forward to meeting new entrants and learning about their respective journeys into our profession.

If any readers would like to discuss changes to professional legal education and how it affects their practice, please contact me direct.

James Mannouch

President

president@liverpoollawsociety.org.uk

LLS Meetings & events – Feb/March 2025

Start Time	Meeting/Event
11/02/2025 12:30	General Committee
12/02/2025 18:00	ADLA 2024 winners & sponsors evening at Fazenda
13/02/2025 13:00	In-House Lawyers Sub-Committee
17/02/2025 13:00	Editorial Sub-Committee
18/02/2025 12:30	Finance & Policy Sub-Committee
20/02/2025 13:00	Non-Contentious Business Sub-Committee
05/03/2025 13:30	Pathways to the Legal Profession for Year 12s in Merseyside
06/03/2025 16:00	International Women's Day event
11/03/2025 12:30	General Committee
13/03/2025 16:00	Family Business Sub-Committee
14/03/2025 13:00	Directors' Meeting with local MPs

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; 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-committee of Liverpool Law Society is considering responding to this consultation paper. 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
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
Non-Contentious Business	Compulsory Purchase consultation	31.03.25

Spotlight on: Alum Ullah



Alum Ullah, Deputy Training Principal at Bond Turner, has been elected Deputy Vice President of Liverpool Law Society for 2025.

Alum Ullah's journey to this position is a testament to his hard work and dedication. Born to a mother who was a housewife and a father who worked as a manual worker, primarily in restaurants, Alum did not come from a traditional legal background.

He attended Lister Drive Primary School on Green Lane, followed by West Derby Comprehensive School. At West Derby, career advisors recognised his analytical skills, strong reading comprehension, and ability to absorb information quickly. While not excelling in sciences, his aptitude for debate suggested a potential career in law rather than medicine. The advisors emphasised the diverse skill sets required within different legal specialisations.

Following their advice, Alum applied to and was accepted at Aberystwyth University to study law. As the first in his family to attend university, he funded his education through hard work and personal savings.

After graduating, he began his legal career with a small firm in Belle Vale before moving to Silverbeck Rymer as a paralegal assistant. He spent five years there, gaining valuable experience and eventually securing a training contract. With seven years of service at Silverbeck Rymer, Alum transitioned to Scott Rees Solicitors, where he focused on litigation. He spent five years at the Newton-le-Willows firm, achieving the position of Associate Partner. Following this role, Alum spent a year heading up the Employer's

Liability and Public Liability department at SGI Legal and then joined Bond Turner, where he has been for nearly nine years, receiving several promotions.

While at Bond Turner, Alum has been heavily involved in training, contributing to the Anexo Academy while maintaining a caseload. He has also actively engaged with the Liverpool Law Society, recognising its value.

Alum is a sessional tutor at Liverpool John Moores University, guiding LPC graduates through evening classes. He also serves as a Senior Member (Chair) of the Valuation Tribunal, handling appeals on various issues, including council tax and ratepayer valuations.

Looking ahead, Alum aims to continue his practice at Bond Turner while fostering the professional development of his colleagues. He is also eager to explore further opportunities for advancement within the firm.

As Deputy Vice President for 2025, Alum will support the President and Vice President, gaining valuable experience in preparation for his presidency in 2027, the bicentennial year of the Liverpool Law Society. He plans to contribute to enhancing the diversity and culture of Liverpool law firms and redefining what it means to be a Liverpool lawyer.

In 2025, Alum is focused on supporting the President and Vice President of the Liverpool Law Society, learning from past leaders, and actively engaging with the legal community. He plans to participate in meetings and events, collaborate with other members of the joint V team, and reach out to law firms to explore how the Society can best assist them. By actively participating in these initiatives, Alum aims to contribute to the success of the Liverpool Law Society and strengthen its position within the wider legal community.

Outside of work, Alum resides in Formby with his wife, Susan, and two daughters, Layla (14) and Nina (9). While his family occupies most of his free time, he is an avid runner, having completed both the London and Liverpool Marathons. He is also a skilled crown green bowler, having achieved a high level of competition in the past. Although his busy schedule limits his active participation in the sport, he remains a member of Freshfield Bowling Club and contributes to their administrative efforts.

We extend our best wishes to Alum Ullah as he embarks on his term as Deputy Vice President of the Liverpool Law Society and prepares for the bicentennial year.

Leaders in Law: Frank Rogers



1. Briefly describe your role as Managing Partner and the main duties of this position.

My role is different from others who would be classed as a 'Managing Partner' because I am a sole practitioner with no directly employed staff, and I run my business from home.

I am fortunate enough to have long standing trusted external advisers providing support with:

- Indemnity insurance
- Accountancy
- SEO & website/marketing
- IT support
- Virtual PA taking calls to my landline 24/7

That essentially leaves me to focus on case work which is my passion. Having become an equity partner within two years of being admitted and apart from a two-year period, remaining as such (or as a director) until I set up on my own, I have had my fill of law firm management issues across full-service law firms!

Having no premises issues, no partner issues, no performance issues (save my own!) and no conflicts to resolve are a total liberation after so many years involved in law firm management and full-service business development.

I am free to concentrate on my new enquiries, growing my business, dealing

with cases for clients across England and Wales (I have recently represented a client in Weymouth for example) and doing what I love the most – helping clients facing prosecution for driving offences.

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

The positive aspects of being a sole practitioner in my situation are mainly the feeling of liberation from pressures arising in a full-service law firm and from managing others. I do not have to worry about recruitment, performance or supervision. I do not have to contend with the conflicts that can arise in law firms over a range of issues, nor do I have to seek approval for any decisions I want to make about how I run my business.

I can take as much time off as I want when I want which my wife finds very attractive!

I guess the only downside is not having the normal water cooler chats with colleagues or being able to bounce ideas off others when you cannot see the wood for the trees in a specific case, but I am fortunate to have barrister and solicitor friends specialising in my area of work who are very generous with their time if I want a quick chat about something.

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

Well, it was Covid that saw me furloughed (had anyone heard of that word before?) as the Courts for three months stopped listing driving offence cases. That allowed me to take a long hard look at where I was with my career and more importantly, where I wanted to be.

By the end of September 2020 Frank Rogers Law was launched.

I first discovered Zoom as a result of Covid restrictions and that (and Teams) has been a godsend as at least half of my clients are not local. Even local clients accept that I do not have a conventional office and so are more than happy to have consultation with me by phone or Zoom

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

See above I guess.

I adopted Leap as a case management system and have found that to be very "agile" along with video consultations.

My Business Plan listed a number of options for me to operate from serviced office accommodation. However, everyone I spoke to questioned the need for me to have an external office at all and the penny dropped. A lot of the time I am travelling to and working in courts and in any event I have always done some work from home. I was lucky to be able to convert a room at home into an office where I have great views across the Mersey estuary. So that avoids the time wasted in commuting, the cost of commuting and the overheads and duplication of equipment that an external office would result in. I find operating from home to be flexible and relaxing as well as hugely cost effective.

5. What do you see as your biggest challenges?

Managing a diary so that Hearings are spread if possible so as to allow time for case preparation. Where courts ask for availability it is easier to do this but when clients have cases listed that need to be dealt with on the appointed date the diary can be very busy – I try to have one full day a week in the office.

Some courts (not local I hasten to add as they are excellent) are very slow to respond to requests to change a date or

to fix a date so you have to keep chasing the and updating availability.

Another challenge is getting instructed in cases where you are already committed elsewhere and either the client does not want an adjournment or, the Court does not agree to one. I then have no-one in house to pass the case to and keep the Fee. Fortunately, across Merseyside and Cheshire there are some firms I can ask to cover work as an Agent. They reciprocate which is good but work is often lost for this reason.

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

Just getting through the regulatory process of launching the firm was for me a huge achievement. I could not have done it without the expertise of **Andrew Donovan**.

After four years (which have flown past) I am very proud of the wonderful reviews posted by clients as they are genuine and make what I do worthwhile. For most of my clients the outcome of the case can have a huge impact on their job, their business and

their family so avoiding a negative outcome for them is hugely satisfying.

Thanks to **Chris Davidson** and **Felix Clarke** my firm's website very quickly enjoyed good rankings on Google and that is something we work on constantly. For a new firm I know I am punching above my weight, and we are much further on in this respect than I expected to be.

I would like to think that in the criminal justice system and amongst my professional colleagues I have built up a reputation for courtesy and expertise. As an articulated clerk I worked a lot with **Denis Clark** then of Corn Exchange Chambers and later of course a Judge at Liverpool Crown Court. I noticed how respectful he was to all the staff in every Court he went to: Ushers, Security, Clerks etc and I have always tried to follow that example. A smile and a bit of banter as you enter and leave a court costs nothing, but it makes the world a better place in my opinion.

7. What are your immediate short-term goals?

- To properly prepare for all the cases in the coming month!
- To continue with the help of **Chris Davidson** to enhance the organic online ranking of the firm.
- To be recognised in directories such as Chambers or the Legal 500.
- To increase turnover and of course profitability.

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

I wish I knew but hopefully I will have retired with maybe the firm's name being carried on by a successor firm.

9. What legacy, as Managing Partner, would you like to leave the firm?

I have no aspirations of this sort because I do what I do for my clients (of course) and for my family.

I would like people to think that I built a successful and respected firm and that personally I was seen as someone who gave of his best and did so with a smile and good humour whether he won or lost.

New telephony service – Advanced Notice

This is an advanced notice of a change of telephony service from this court. This change is part of our ongoing commitment to improve our services and ensure a seamless experience for you.

As of the **3 February 2025**, we will no longer be accepting direct calls for Family Court and Civil County Court enquiries at this court. Instead, you will be able to reach us at our contact centre in **HMCTS National Services** by dialling **0300 123 5577**. Your call will be handled by a dedicated member of our National Customer Contact Team who are trained in the Family Court and Civil County Court process. For contact outside of this remit such as High

Court (including Administrative court), Business & Property Court, Court of Protection and Criminal Court queries, these will continue to be handled directly by the court.

This change is driven by our HMCTS strategy of call centralisation and aligns with our ongoing efforts to streamline service delivery. By moving Civil & Family telephony contact from the courts to the National Services' customer contact team, we aim to enhance efficiency, allowing courts to focus resources on core administrative tasks, and facilitating court proceedings. We kindly ask for your support and understanding as we make this transition.

The contact centre will be open from 8.30am to 5pm, Monday to Friday, except Bank holidays.

We appreciate your patience and support as we transition our telephony to our national call centre.

Yours sincerely,

Leanne Lockwood
Delivery Manager



**HM Courts &
Tribunals Service**

Irwin Mitchell Planning & Environment Partner awarded Outstanding Lawyer of the Year 2024



Pamela Chesterman



Pamela with Irwin Mitchell colleagues at the awards evening

Irwin Mitchell was immensely proud of Pamela Chesterman’s award as Liverpool Law Society’s Outstanding Lawyer for 2024. Pamela is a niche planning and environmental solicitor with over 20 years’ experience spanning both local authority and private practice. She joined Irwin Mitchell in October 2022 and has been a stalwart addition to the Liverpool office, expanding the firm’s Planning & Environment team led by the prestigious Claire Petricca-Riding in Manchester, focusing on its presence in Liverpool alongside founding Partners, Jonathan Betts and Matt Garson.

The reaction on the evening, from Liverpool law firm peers including those similarly nominated for this award, was illustrative of her achievement in growing the firm’s presence in Liverpool since her arrival at Irwin Mitchell. Pamela is well-known and well-regarded by colleagues, clients and fellow industry professionals throughout the North West, but

especially in Liverpool.

Pamela practices in planning and environmental, but with her local authority background is often instructed to advise on local government issues including exercise of local authority powers, councillor and officer bias, governance, openness and transparency, something that she brings unique experience of and adds to the breadth in the Planning & Environment Team, but also as part of the wider all-service firm.

Pamela said “I am proud to bring focus to planning and environmental law in the city, particularly in the wake of new Labour government’s revision to the NPPF, the national framework against which all new local plans will be assessed. The designation of Liverpool Freeport and Investment Zone, the construction of Everton’s new football stadium and continual improvements in transport and highways networks in Liverpool thanks to devolved powers to the Mayor and Combined Authorities,

means that development remains a central and much-needed focus. Advisers in this area will be key, especially those with existing knowledge and ability to keep up to date with law and practice. I am excited about the challenges still to come whilst everyone working in the wider regenerative industries looks to make the most of the incentives that might arise.”

Pamela works with a wide range of clients including landowners, housebuilders, SMEs, corporates, Councils, residents’ groups and the full array of specialist consultants.

In addition to this award Pamela has been recognised in Legal 500 as a Leading Partner 2025, and Leading Individual 2024. She is a Director of Liverpool Law Society, a member of its Non-Contentious Business Committee, as well as serving on other committees in the North West (Women in Property, Merseyside Women Lawyers Division Liverpool, Manchester Law Society – Property Committee).

Liverpool Law Society

ADILA

ANNUAL DINNER &
LEGAL AWARDS 2025

SAVE THE DATE

13.11.25

SPONSORED BY



Fletchers to acquire Scott Rees in first deal of 2025

Fletchers Group (Fletchers) has today announced that it is to acquire Northwest law firm Scott Rees & Co Solicitors.

The deal will see 97 fee earners and support staff from the firm’s personal injury and clinical negligence teams transfer to Fletchers once the deal completes at the end of February 2025.

Based in Newton-le-Willows, Cheshire, Scott Rees was founded in 1992 and specialises in employers’ liability, public liability, fatal accident claims and clinical negligence.

Scott Rees’s Managing Partner, **Royston Smith**, will stay with the firm post announcement to support the business through the transition to Fletchers next month. Fletchers’ **Charlene Mann** will then take over the reins and lead the Scott Rees business through the integration period, which is expected to last until summer 2025.

The team will continue to operate from the office near Haydock Park Racecourse, and the brand will remain in place for the time being.



Peter Haden

Peter Haden, Fletchers Group CEO, said the acquisition was the latest step in a strategy to scale up by acquiring great



Fletchers' Liverpool office

companies with high-quality people and equally high-quality case work.

He said: “Scott Rees is a successful Northwest law firm built on high standards of client service and professionalism, making it a great fit with Fletchers.”

“We are wholly committed to long-term growth in the personal injury sector, where Scott Rees is already well-established, and we warmly welcome our new colleagues into the Group to strengthen our legal practice and build on their success.”

The acquisition is the second in a year for Fletchers, following the deal to buy Serious Injury Law in February 2024. Haden made it clear that Fletchers plans to continue its buy and build strategy, having agreed acquisition financing with Pemberton Asset Management in June, as well as the continued backing of owner Sun European Partners, which creates further headroom for M&A.

“Our team is keen to talk to owners of personal injury and clinical negligence law firms who are attracted by the opportunity to join a successful growth-

oriented law practice with a great working culture and the right core values, to further our mission to rebuild people’s lives after they’ve suffered serious, life changing injuries.”

“Just as Fletchers will provide Scott Rees colleagues with more opportunities for personal and professional growth and development, so we are keen to welcome other individuals and firms to experience the same.”

Commenting on the deal, **Royston Smith**, Managing Partner at Scott Rees said: “I echo Peter in saying this is a fantastic opportunity for our people and the clients we serve.”

“It is the right move at the right time. Fletchers has the capability, access to cases, and investment support to ensure long-term growth and provide colleagues with more opportunities for career progression.”

He added: “It’s clear that consolidation in the personal injury sector is accelerating, and I am convinced that Fletchers will be one of the winners in this rapidly changing market.”

The consideration is undisclosed.

DWF reappointed to Serco legal panel

DWF, the global provider of integrated legal and business services, has been reappointed by Serco to provide legal services to its UK and European business for another three years.

Serco is a global service provider to Governments that operates in various sectors including justice, defence, space, health, transport and migration.

The reappointment secures DWF's place as one of four law firms on Serco's UK and Europe legal panel for a minimum of three years, with the potential for a one-year extension.

Commenting on the reappointment, **Rachel Jones**, partner at DWF, said: "We are delighted to have been reappointed to Serco's legal panel and truly value the trust Serco has placed in us once again. We look forward to continuing this partnership, working closely with Serco over the coming years and supporting their initiatives across the UK and Europe."

Heather Key, Chief Legal Counsel for Serco's UK & Europe business, said: "We are pleased to continue working with DWF



Rachel Jones

and value their expertise and ongoing commitment to supporting our legal needs. Their collaborative approach and understanding of our business make them a trusted partner, and we look forward to the continued success of our relationship over the coming years."



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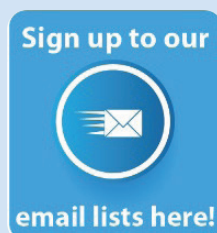
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Our training, member and general news & events emails will come from legalnews@liverpoollawsociety.org.uk and automated messages from our website (such as when making a booking for one of our courses or events) will come from enquiries@liverpoollawsociety.org.uk.

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!

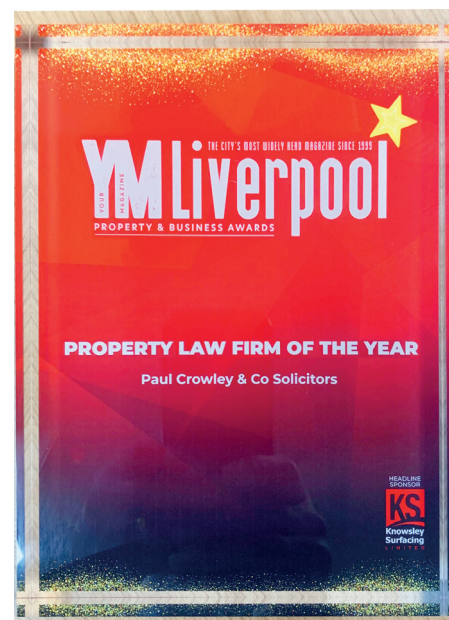
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A Triumph of Excellence: Paul Crowley & Co's Conveyancing Team Celebrates Remarkable Success



Jenna Gall and the jubilant Paul Crowley & Co property law team receiving the YMLiverpool 'Property Law Firm of the Year' award from Claire Sweeney



The conveyancing team at Paul Crowley & Co is set to build on their 2024 success with the planned expansion of their Property Law team. The team celebrated in style by winning two major awards on the property calendar: 'Property Law Firm of the Year' at the YM Liverpool Property & Business Awards 2024 and 'Residential Property Team of the Year' at the Modern Law Awards.

Jenna Gall, Head of Conveyancing expressed her pride, stating, *"It's been an outstanding year, it's wonderful to see the team achieve this recognition. Their dedication, hard work, and exceptional performance has set a high standard, ensuring the best outcome for our clients."*

These awards reflect not only the firm's continued development but also their unwavering commitment to both their staff and clients. The pursuit of excellence is a core value at Paul Crowley & Co, and these awards are a recognition of the high standards they uphold in the field of property law.

Beyond their professional achievements, Paul Crowley & Co is deeply involved in the community. The firm actively participates

in various local initiatives, supporting charitable causes and community projects. Their involvement ranges from sponsoring local events to providing pro bono legal services to those in need. This commitment to community service underscores their dedication to making a positive impact beyond the legal sphere.

The Modern Law Awards and the YM Liverpool Property & Business Awards are significant events in the legal and business calendar, highlighting the best in the industry. Winning these awards is no small feat, and it underscores the exceptional work being done by the conveyancing team at Paul Crowley & Co. Their success is a source of inspiration and a benchmark for others in the industry.

The team's achievements are a result of their collective effort, expertise, and a client-centric approach that ensures the best possible outcomes. Their ability to consistently deliver high-quality service has earned them a stellar reputation.

In conclusion, the conveyancing team at Paul Crowley & Co has set a high bar for excellence in the property law sector. Their recent awards are a reflection

of their commitment to quality, client satisfaction, and professional development. The expansion of the property team will bring several benefits, enhanced expertise, improved service, personalised attention, innovative solutions and community involvement allowing the firm to further support local causes and projects.

As the team at Paul Crowley & Co continues to celebrate their success, they remain focused on maintaining their high standards and delivering exceptional service to their clients. Their recent accolades are a testament to their hard work and dedication, and they look forward to continuing their tradition of excellence in the years to come.



New community hub is proving a winner for Tony and his team



Caroline Farrington, Laura Newcombe, Tony Grant and Haley Farrell at the A&K Community Hub

Former footballer Tony Grant and his business partners have kicked off a new venture after launching a community hub to host social activities and provide advice on issues such as fuel poverty, debt and benefits.

The A&K Community Hub has opened at the former Our Lady's Parish Centre on Park Road North, Birkenhead.

The two-storey building is already welcoming around 500 local people each week for a wide range of activities after undergoing an extensive refurbishment.

Activities include clubs for mums and toddlers and people with autism and Alzheimer's, quiz evenings, knit-and-natter and bingo sessions, a job club and courses in English for speakers of other languages, as well as the advice sessions.

The building has a function hall with a capacity of 150, a community room and an IT suite to help local people improve their

computer skills so they can better navigate the internet for online banking, making medical appointments and performing other tasks.

The hub is the latest initiative by **Tony** and his business partners **Kevin Kirby** and **Laura Newcombe**, following the launch of their A&K Football & Education venture in 2023.

Caroline Farrington, of Southport-based Farrington Law, provided legal advice to A&K Football & Education on the takeover of the building from the Diocese of Shrewsbury.

Farrington Law is part of the Jackson Lees Group of north west solicitors' practices.

Caroline said: "It was a pleasure to advise Tony and his colleagues to assist them so they could realise their vision.

"They are such lovely people and they just want to help the community – they genuinely care.

"The new hub is really positive for the area and we look forward to seeing it flourish. What Tony and his colleagues have done to the building is amazing and the range of activities and services on offer is great.

"It's so important that there is a place like this where people can go to meet others and socialise."

Tony played for clubs including Everton, Manchester City and Burnley during his career as a midfielder before retiring in 2008, then went on to work as a coach at Blackburn Rovers, Blackpool, Forest Green Rovers and in Australia, India and Saudi Arabia.

A&K Football & Education provides courses based on football and physical activity, as well as wellness and skills workshops, to help young people who have fallen out of mainstream education get back on track.

Tony said: "The new hub is another way of giving back and making a difference to the community.

"There's a big need for a facility of this kind in the area, which is evident by the number of people who are already coming along during the daytime and in the evenings to take advantage of the variety of clubs, activities and sessions on offer.

"It's a great space where people can socialise and enjoy activities with others, learn and get help and advice, and we are looking at further enhancements, including a community launderette.



“We’ve had tremendous support from Cadent through its Centres for Warmth programme, and would welcome support and donations from other local businesses to assist with our plans to expand our offering.”

He added: *“I’ve been in football all my life and it’s what I understand best, but I’m always keen to support vulnerable people and families. We are living in a time of fuel poverty, a cost-of-living crisis, and issues around loneliness and inclusion in general.”*

“Hopefully the hub will be recognised as a great asset to the community. My vision is to grow our offer throughout Wirral and maybe beyond.”

Laura is leading the day-to-day running of the hub as its manager, supported by paid staff and numerous volunteers.

Jackson Lees Group 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.

Haley Farrell, deputy managing director at Jackson Lees Group, said: *“Tony and Laura are doing fantastic work with the new community hub, which perfectly aligns with the Jackson Lees Group’s core value of making a positive difference. We are delighted to support its development and eagerly anticipate the positive impact it will have in the future.”*

DWF's UK corporate team advised on more than 200 deals in 2024, with deal values totalling more than £5bn



Frank Shephard

DWF, the global provider of integrated legal and business services, has advised on 200 deals in 2024, with a combined deal value of more than £5 billion.

In 2024, the DWF Corporate Team had another very successful year by continuing to focus on its core sector strengths and bringing that knowledge to its clients’ deals. In deal value terms TMT transactions stood out as the highest value area for the team, with notable highlights such as advising Calibre Scientific on a number of European deals, including five acquisitions of UK life sciences tools and diagnostics companies, NorthEdge on the sale of CMAP software and the management shareholders on the investment by ECI Partners and acting for Daisy in its merger with Wavenet, creating the UK’s largest independent IT managed services provider.

Within its market leading Venture Capital Group the team advised Pastest, the provider of technologically driven test preparation solutions, on its minority equity investment in The Medic Life and Scottish National Investment Bank on a number of different investments in the technology sector including in Utopi Ltd, Cyacomb, Travelnest and Pneumowave and social impact venture capital investor, Nesta, on its investment in Gaia Learning Limited.

The financial services sector accounted for a substantial portion of DWF’s corporate transactions, with the team advising on 43 deals in this sector. Many of these deals were completed by the Private Equity Group including advising Inflexion on the sale of Southport-based broker David Roberts & Partners to BMS Group, Sovereign Capital Partners investment in LB Group (subsequently rebranded Affinia) as a buy and build accountancy practice platform acquisition and AssuredPartners on its acquisition of leading independent Lloyd’s broker, the Harman Kemp group.

The team also advised on a number of high-profile real estate deals throughout the UK & Ireland in 2024, including acting for Dandara Group in the sale of its newly developed build to rent (BTR) scheme to Europa and advising LXi REIT

on the £210m corporate and asset sale of a portfolio of 66 Travelodge-branded hotels to Travelodge Hotels Ltd.

Frank Shephard, Global Head of Corporate at DWF, said: *“The breadth and scale of transactions we advised on in 2024 reflect the strength and adaptability of our UK & Ireland corporate team. Despite a challenging year in many ways, where markets have suffered from subdued liquidity and a slowdown in activity, our corporate team has remained exceptionally busy and continued to deliver strong results. That has been achieved by our one team approach where the whole team works as one, and bringing technology and process efficiency to everything we do for our clients.”*

Looking ahead, we anticipate continued private equity and venture capital activity, with funds and corporate acquirers poised to deploy unused capital and take advantage of new international business momentum in 2025. As market conditions continue to shift, our commitment to excellence and client service ensures we are well-positioned to drive further success in the year ahead.”

For a deep dive into key trends and insights from the past 12 months of transactional activity within the UK/I Corporate team, please download our report [here](#).

Weightmans makes top five in UK's Top Employers list



Helen Taylor

National law firm Weightmans has been awarded UK Top 10 Employer status for the 18th year in a row – reaching its highest ranking ever at number five.

The Top Employers Certification programme – run annually by the Top Employers Institute, a global body – recognises and celebrates outstanding people-centric policies and practices that have created positive workplace environments around the world.

Organisations are assessed on the results of a HR Best Practices Survey, which covers six HR domains and 20 individual topics, including people strategy, work environment, talent acquisition, learning, diversity, equity & inclusion and wellbeing.

The news comes on the back of a raft of successes for the top 40 firm during the last year. Its 23/24 results saw its strongest financial results in its history with net profit up 41% on the previous year, meaning all staff received a bonus of almost £3,000 each in recognition of their contribution to the firm's successful year; while the firm received the highest Platinum rating by EcoVadis, a global sustainability rating provider, positioning the firm in the top 1% of legal and accounting businesses globally for ESG/sustainability performance and processes.

Weightmans also continued to champion colleagues' professional development – with 27 people promoted to partner or legal director.

Weightmans HR Director, **Helen Taylor**, said:

"This is an incredible way to start the new year and fully endorses the hard work put in by everyone at every level of the firm in making Weightmans such a great place to work, thrive and build a successful career."

"We See the Possibility in all of our people and they are instrumental to our success. The firm believes in the power of people working collaboratively to drive our collective success."

Top Employers Institute CEO **David Plink**, said:

"Consistency in a not-so-consistent world? Amidst constant change - through technological advances, economic shifts, and evolving social landscapes - it is inspiring to see people and organisations rise to the challenge. This year, the Top Employers Certification Programme highlights the dedication of our Top Employers as they continue to set the standard, consistently delivering world-class HR strategies and practices. These Top Employers strive to foster growth and wellbeing, all while enriching the world of work. We are proud to celebrate these people-first leaders and teams as the Top Employers for 2025!"



Weightman's workspaces at Old Hall Street



Enjoy a day of golfing, networking and camaraderie with fellow professionals.

Date: Wednesday, 25th June 2025

Time: Tee Times start from 11am

Location: Heswall Golf Club

Address: Cottage Lane, Gayton, Wirral, CH60 8PB

Event Highlights:

1. **Tournament:** The day will feature an exciting golf tournament at Heswall Golf Club, a championship course with breathtaking views across the Dee Estuary. The course provides the perfect challenge for golfers of all abilities.

2. **Prizes:** Prizes will be awarded for various categories, including Longest Drive, Closest to the Pin, Team Winner and the overall Tournament Winner. Who might wrestle the trophy from the existing holders The Keith Jones Partnership?

3. **Networking:** It's not just about golf! This event will provide a wonderful opportunity to network and socialise with fellow members. Forge new friendships, catch up with old ones, and enjoy the company of like-minded individuals.

4. **Dinner & Awards Ceremony:** After the tournament, we will gather for a delicious dinner and an awards ceremony to recognise the tournament winners and

share memorable moments from the day.

Early Bird Entry Fee

£450 +vat per Team of 4

To access the offer, the booking must be made and paid for **by noon on Friday 14 February.**

Entry Fee after 12noon, 14 February

£500 + vat per Team of 4.

The entry fee includes light refreshments on arrival, green fees and evening dinner.

Registration Details

To book a team, go online to <https://www.liverpoollawsociety.org.uk/events/2025-golf-tournament/>

We look forward to welcoming you to the Liverpool Law Society Golf Day and making it a memorable experience for everyone.

Following the success of the inaugural golf tournament in 2024, we can't wait to

see you on the green this year!

We are delighted to welcome as our headline sponsor:



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Sponsorship Opportunities

If you are interested in becoming a sponsor, please contact Sarah Poblete at sarah@liverpoollawsociety.org.uk for more information.

Society celebrates the future of the legal profession



The Liverpool Law Society held a special event on 29 January 2025 to welcome into the profession all those from the Liverpool City Region who qualified into the law during 2024.

The President of the Liverpool Law Society, **James Mannouch**, began by thanking all those in attendance, including our valued sponsor The University of

Law. James commented “*Routes to qualification have expanded in recent years and it is heartening to see many new solicitors benefitting from this evolution. The Liverpool Region has a long tradition of training solicitors and of retaining and developing them. Good firms need good lawyers, but good lawyers need good firms. Long may this relationship continue.*”

He also spoke about the importance of getting out and networking from very early in one’s career. The contacts you make now will be with you for your whole professional life.

The President then invited **Mark Evans**, who is a lecturer at The University of Law and also Vice President of the national Law Society to address the attendees. Mark shared with everyone his background and how not knowing anyone in the law, has made it his career, practising for many years before becoming a lecturer in law whilst also rising to be president-elect of The Law Society of England and Wales. Mark was followed by **Beth Walker**, Chair of the Merseyside Junior Lawyers Division, who explained the important work of the Merseyside JLD, educational, social and charitable and invited anyone not already a member to sign up via their website.

The Society was delighted to have Resident Judge & Honorary Recorder of Liverpool, **His Honour Judge Menary KC DL** as the guest speaker

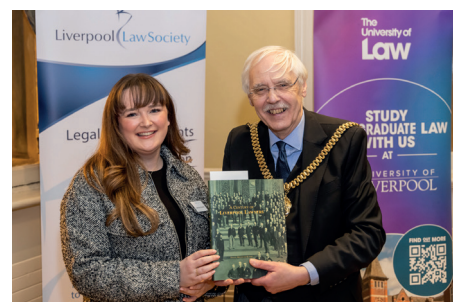
and certificate presenter for the newly qualified solicitors. Judge Menary talked about his journey in law with amusing asides and anecdotes before offering his sincere congratulations to the following newly qualified solicitors:

Aaron Ocquaye
 Alix Johnston
 Bethan Walker
 Carys Thornton
 Charlotte Baggaley
 Elizabeth Earps
 Elizabeth Manning
 Ella Jackson
 Emma King
 Eve Stott
 George Perrett
 Grace Roberts
 Hannah Beardmore
 Holly Knowles
 Jack Enright
 Josh Bourke
 Laura-Jayne Beattie
 Lucy Baker
 Matthew Thomas
 Melissa Mouldsdales
 Özgü Horozal
 Samuel Johnson
 Sarm Aghahoseini
 Sean Pinnington
 Sophie Morton
 Storm Evans
 Victoria Hannon



A further two Liverpool Law Society prizes were awarded.

The E. Rex Makin Prize was awarded to the youngest Solicitor to be admitted to the roll in the Liverpool constituency being **Daniel Stephenson** from Bermans.



The Muir Matthews Prize was awarded to a young or trainee solicitor in Liverpool who was judged to have made the largest contribution on an all-round basis. The winner was **Jemma Castell** who works at Pinsent Masons.



There were also prizes awarded for achievement in professional examinations based on the results of the Legal Practice Course at the Liverpool John Moores University and at the University of Law. The prizes are administered via the Society's Education & Charities Committee. We were honoured that the Lord Mayor of Liverpool, **Cllr Richard Kemp MBE** was present to hand out the books and cheques for these awards. The Lord Mayor talked about the importance of the rule of law and the independence of the judiciary. Cllr Kemp gave his warm congratulations to all the prizewinners. The academic prize winners were:

Following the formal presentations, everyone had a chance to socialise, enjoy a few drinks, and were also treated to some canapes. Directors of the Society were pleased to have the opportunity to speak to many of the attendees and see many familiar faces who have risen through the ranks to become qualified.

Full photo album appears [here](#)

All photographs by **Adam Kenrick**.

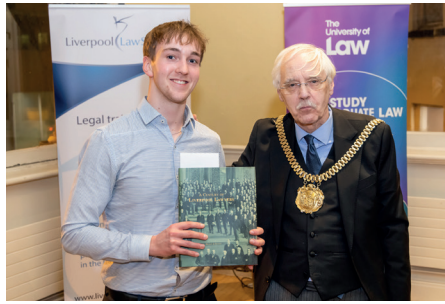
More photos on following page.

Kindly sponsored by [The University of Law](#)



- **Eddy Davies** from Brabners, winner of the Atkinson prize for 2024
- **Jessica Craige** from MSB, winner of the Enoch Harvey prize 2024
- **Caitlin Young** from Hill Dickinson, winner of the Rupert Bremner prize 2024
- **Aishath Ahmed** from MSB, winner of the Timpron Martin prize 2024
- **Juliet Mistry** from DTM Legal, winner of the C.A. Getley prize 2024





Merseyside Junior Lawyers Division



Court Marshalling

The deadline to apply for the Spring Intake of the Court Marshalling scheme was on 31 January 2025. We are thrilled that Junior Lawyers will have the opportunity to shadow a Judge in the County, Criminal or Family Court

gaining valuable experience as they progress within their legal careers.

LLS v MJLD Quiz

We are excited and getting ready for the **Liverpool Law Society v Merseyside Junior Lawyers Quiz** on 27 March 2025.

Quiz team *Those who cannot be legally named* from Hill Dickinson won last year. Will a team from LLS ever win again? Further details to be announced soon.

Samuel Johnson, Bond Turner MJLD Press & Publicity Representative

Is B Corp status right for your law firm?



B Corp certification is gaining traction across many industries and the legal sector is no exception. For law firms, becoming a certified B Corp demonstrates a commitment to balancing purpose and profit. But is it right for your law firm?

The process which applicants must follow to obtain B Corp status, whilst challenging, is now reasonably well established and, as we argued in an earlier article, is about corporate governance and culture.

The benefit of B Corp status

At its core, B Corp certification reflects a firm's commitment to high standards of social and environmental performance, corporate governance, and stakeholder accountability. It will support your firm in developing a stronger reputation in the market as not just being profit driven but demonstrating a greater purpose in making a positive impact on society and the environment by being ethical, responsible, and transparent. In doing so, your firm can benefit in a number of ways, including:

Employee engagement and talent: There has been a trend of candidates considering working for companies who are socially responsible and commit to ethical practices, which can also create a more positive working environment, increasing morale, engagement and retention.

- **Attracting clients:** Clients and prospective clients who are conscious of sustainability and their own ethical and social practices, are looking to engage with companies who take the same approach and will take preference with those that align with their own values. The result being that they are more likely to choose a firm that is B Corp certified over one that isn't. It can also build trust and demonstrate the firm's integrity to meet high standards.
- **Global network:** You'll gain access to the "B Hive" global network, opening doors to valuable partnerships and collaborations with other mission-driven businesses.
- **Growth & succession:** Demonstrating that your firm cares about sustainability will increase the likelihood of thriving over the long-term.

Challenges your firm might encounter

Before pursuing certification for your firm, it's crucial that you consider the potential downsides, as well as the inherent risks your firm might face in both pursuing and obtaining B Corp status, which include:

- **Committing resources:** Certification is rigorous and can take months, if not longer, to complete. Your firm must be prepared to dedicate time, personnel, and financial resources, which might be better served in other areas of your business.
- **Ongoing commitment:** Your efforts won't end on certification, as your firm will need to recertify every three years. For smaller firms especially, this commitment may become quite burdensome where such resources are limited.
- **Governance issues:** B Corps must amend their governing documents to reflect stakeholder commitments. These changes could affect your firm's decision-making flexibility or inhibit your ability to act swiftly when issues arise.
- **Reputational damage:** Becoming

a B Corp invites public and client scrutiny over whether your firm truly adheres to its commitments, and any perceived failure to meet such standards could harm your firm's reputation, or even invite accusations of 'green washing'.

Is B Corp certification right for your law firm?

While the certification process may be challenging, the inherent benefits for those firms which are deeply committed to operating as a B Corp can make it well worth the effort.

Nonetheless, if your firm cannot truly dedicate long-term commitment and necessary resources to meet the certification requirements, then it's not right for you.

If there are parts of being a B Corp which appeal to you but the onerous certification process and administrative burden for ongoing review deters you, there is nothing to prevent you from adopting practices within your firm to demonstrate dedication and consciousness to your social and environmental impact without the need to be globally recognised as a B Corp. This will still attract talent, clients and support the reputation of the firm, without being in the 'inner circle'.

Ultimately, before deciding whether your firm should pursue B Corp status, your leadership will need to have a very clear understanding of why you're pursuing certification, what you hope to achieve in doing so and to do it for the right reasons as it'll impact every aspect of your firm and its culture.

.....
If you'd like to discuss this in more detail, please email [Michael McKenna](mailto:Michael.McKenna@liverpool-lawsociety.org.uk) or call 0151 906 1000.

Michael McKenna
 Solicitor,
 O'Connors Law

05.03.25 1.30pm - 3.30pm



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

President

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 Laura Samaroo, Senior Lecturer in Law and Programme Leader 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 Simon Carr, Senior Business Development Representative and Lydia Jones, BDR, 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



Halton Chamber of Commerce is a not-for-profit organisation dedicated to supporting businesses in the Halton region. With over 400 businesses across Runcorn and Widnes in membership, the Chamber's mission is to promote economic growth and development for all. The Chamber provides various services and resources to support a thriving business environment that fosters innovation, collaboration, and economic prosperity.

Key Services:

- **Networking Opportunities:** Regular events help to facilitate business-to-business connections and encourage inter-trading with informative presentations from local leaders focusing on key strategic issues.
- **Business Support:** Offering tailored

services and support to help businesses thrive at every stage of the business lifecycle, across all sectors.

- **Advocacy:** Representing the collective voice of the business community on important issues.
- **Training and Development:** The Chamber delivers quality training locally to ensure all organisations have access to the skills and learning they need to succeed.

On the 4th March, Halton Chamber are hosting a breakfast networking event focusing on how to win more business through tendering. This free of charge, interactive workshop session will be at The Heath Business Park from 7:30am. Booking is now open at <https://www.haltonchamber.co.uk/events/1stuesday-breakfast-networking---how-to-win->

[more-business-through-tenders_740.html](#)

Currently, Halton Chamber is working collaboratively on the Local Skills Improvement Plan (LSIP) and would like to involve organisations of all sizes from the legal sector/professional services so that together we can make sure that everyone has access to the skills and future expertise that they need. If you'd like to know more, please get in touch.

Above all, Halton Chamber is a welcoming organisation, keen to support and foster collaboration and innovation among members and key stakeholders to ensure that Halton is a great place to do business.

www.HaltonChamber.co.uk
0333 358 3480
info@haltonchamber.co.uk



The Legal Loop: Case Manager, Paul, from the Wellbeing & Grants Team



The Legal Loop is putting the incredible Case Manager spotlight on Paul, one of our team members from the Wellbeing & Grants Team. Paul's day-to-day role is a key part of the wider mission to make sure that solicitors have access to wellbeing support.

"Each client's story impacts and impresses upon me just how much we are needed and valued - and how important flexibility is," says Paul, who has worked for the charity for three years.

What makes The Solicitors' Charity so special?

He believes what sets The Solicitors' Charity apart from others is "the incredible generosity of the trustees and team, not only in respect of making awards and grants, but in the giving of time and enthusiasm to allow each client the best possible journey".

Paul believes that his work with the Wellbeing and Grants Team makes a real difference to people's lives. He is proud to be the first port of call for support, working in a small team of five to deliver direct client services. "In essence, we're part of the face of the charity", he says.

"It's so rewarding to deliver frontline case management services to our clients - by listening to them, supporting them to access our services, or external services; being able to authorise some awards

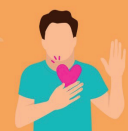
and grants or putting together a comprehensive package of support". Having worked in the charity sector for several years, his inspiration for joining this charity was to develop his support for solicitors and their dependants in difficult times. We asked Paul to share only three words to sum up what The Solicitors' Charity is...



"I want more people to know that we're here if they are facing hardship. So, if you or someone you know, needs help, tell them about us and if we cannot help directly, we will do our best to signpost them to where they need to be".

Thinking about reaching out for wellbeing support? It's completely okay to ask for help, and the Wellbeing & Grants Team is here to be a listening ear and offer guidance.

"I wish I'd known about you before, as I would have approached you first"



Find out more: <https://thesolicitorscharity.org/how-we-help/>

Council Member's report



Jeremy Myers

A worthwhile day was spent by me in London on 11 December for my first in-person Council meeting. The quarterly event was attended by 83 members (including I believe about 10 online) out of the available 95. Currently, there are two vacancies. Much detail cannot be reported due to confidentiality, though I can certainly provide significant news.

The bicentenary programme of The Law Society (TLS) rolling through 2025 has been settled. There will be dedicated slots for local Law Societies to arrange for their members to have tours of the 113 Chancery Lane building. I shall keep Liverpool Law Society (LLS) updated and I would recommend members to take

the opportunity if available. I shall see what we can arrange.

TLS's own Outcomes Report of 2023-24 was considered. It included programmes in trying to ensure that TLS is an employer of choice and that it was working on achieving an ethical framework for in-house solicitor. The in-house portion of the profession – about 25% - was a topic highlighted later in the meeting when the Post Office Horizon computer scandal was mentioned. The pressing need for assistance to in-house solicitors who would appreciate guidance and support when faced with professional dilemmas is well-recognised by TLS.

Axiom Ince's collapse is an ongoing area of discussion. My previous report highlighted the position of the Legal Services Board (LSB). We learned that the LSB had sent to TLS an outline of its proposed Directions to the Solicitors Regulation Authority (SRA), for comment by TLS. TLS receives much information as the regulator who delegates its authority to the SRA and on which it cannot comment as a representative body. Other SRA issues still pending include the Client Money consultation and the awaited LSB view on the SRA's proposal for its own fining powers.

The Board Report was as always a key event of the day. Members will recall that the Board of 17 is effectively the executive with the Council approximating to the

legislature. The matter of CILEX seeking SRA regulation for Legal Executives remains outstanding and the Board's Working Party is reaching conclusions on its view. Insurance compensation from the fire at 114 Chancery Lane is almost completed with some points yet to be resolved. I asked a question about the level of compensation and received a detailed reply.

TLS has for some ninths been working on a "Get Involved" outreach to the full membership. That cohort comprises about 200,000 people when counting non-practising individuals. It is estimated that about only 1% of the membership actively involved nationally or locally. This is an attempt to tap the knowledge and expertise of the wider profession.

I am in contact with the TLS Staff member, **Louise Hanson**, who is developing the "Get Involved" idea. I hope to let you know more and through LLS's e-mail updates to seek your involvement in a way that does not involve Committee work but channels know-how and wisdom.

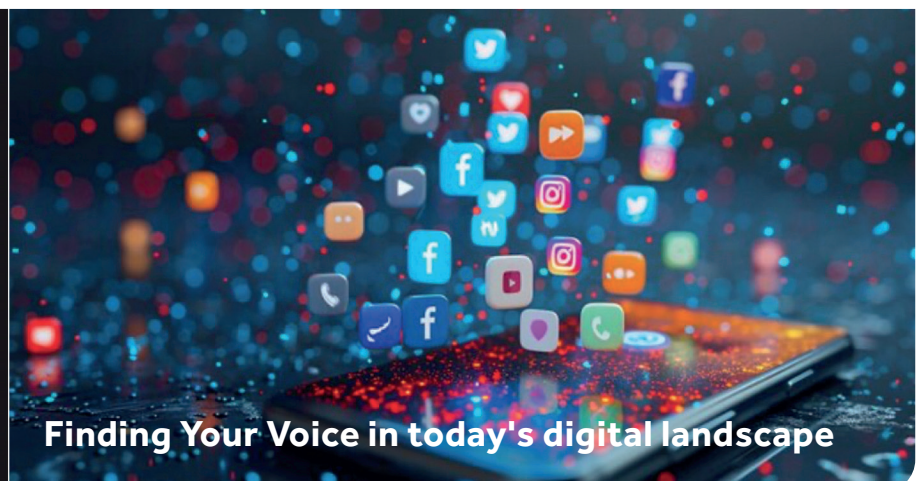
Getting to know new colleagues is a vital part of the role. This was helped by our chats in the breaks during the day and in a trip to a local Pub with about ten others after we finished. I am keen to hear your comments and suggestions, so please do not be shy!

Jeremy Myers



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eMEDIA

TEL : 0151 651 2776
simon@baskerville-e.media



Finding Your Voice in today's digital landscape

Standish v Standish: Why estate planning professionals and family lawyers must work together

2025 promises a Supreme Court decision to bring to a close the long-running saga of Mr and Mrs Standish's divorce.

In May 2024, the Court of Appeal case of *Standish v Standish* [2024] EWCA Civ 567 demonstrated how wealth planning during marriage risked a higher settlement being awarded to other spouse than might otherwise have been the case.

Background

The family wealth was £132 million. A second marriage for both, the husband brought into the marriage significantly more wealth than his wife.

During the marriage, the husband transferred £77 million, previously held in his sole name, to his wife as part of a tax planning exercise.

The parties separated.

At first instance: Mrs Standish argued that by transferring assets into her sole name, her husband intended for his wealth to be shared and a large proportion of the overall assets divided 50:50

The judge agreed that the resources should be shared, but not quite equally. The court awarded her £45 million. After a 15-year marriage, this was approximately one third of the parties' total wealth.

Court of Appeal: The wife sought to appeal - seeking an uplift to nearer 50%. This claim for more backfired. Her husband cross-appealed, arguing that the money was acquired before the marriage and so should be deemed to be a non-matrimonial asset and not be subject to a sharing claim.

The Court of Appeal reduced the wife's award from £45 million to £20 million. This is believed to be the largest ever reduction in UK divorce history.

Supreme Court: Permission to appeal was granted to Mrs Standish in October 2024.

The Supreme Court is scheduled to hear the case in the Spring of 2025.

What could have happened differently?

1. There should have been a pre-nuptial agreement.

A pre-nuptial agreement before the wedding, recognising the greater financial contribution he brought to the relationship, would have assisted Mr Standish.

A pre nup can:

(i) Predetermine the outcome of a divorce settlement, taking away the stress, uncertainty and cost of a court dealing with it if there were a divorce.

(i) Endeavour to safeguard or ringfence certain assets to protect them from future claims if there were a divorce. Pre nups are commonly used if there is a wealth imbalance between the parties.

Although a pre nup is not legally binding in England and Wales, since 2010 and the Supreme Court's judgment in *Radmacher v Granatino* [2010] UKSC 42, the law has evolved such that a pre or post nuptial agreement will provide significant protection to those seeking to protect assets.

Current law means that the court is not obliged to give effect to the agreement, but the court must give it appropriate weight when exercising its discretion. Subject to certain safeguards being adhered to when entering into the agreement, and provided that the agreement reached is not unfair and does not leave one party in need, those signing a nuptial agreement can expect to be held to it. Even if they successfully argue otherwise, it is very likely that their divorce settlement will be lower than that they might have expected, had they not entered into a pre or post nup.

In their report of 18 December 2024, the Law Commission repeated their

recommendations initially made in 2014, for a review of the law relating to nuptial agreements. It is thought that the wind of change is moving towards more certainty of outcome and so a nuptial agreement to become more, not less, likely to be upheld in the future.

2. There should have been a 360-degree review prior to the asset transfer

At the time of the transfer of money from husband to wife all eyes were on the tax planning possibilities this presented. A balanced review from both private client and family lawyers would have highlighted how the wealth planning may impact a future divorce. Informed decisions could then have been made, with pros and cons calculated and considered.

The tax rationale was that if the husband transferred assets to his wife before he became domiciled in England, the assets would escape UK IHT. It was then intended that after a suitable lapse of time, the wife could place the assets into an offshore discretionary trust. It was an option for the husband to be added as a beneficiary and benefit from them.

At first instance, the court founds that the transfer of assets 'matrimonialised' them, at least in part, allowing the wife to make a sharing claim over them when she filed for divorce. If an asset is 'matrimonial' it means that it has been built up or acquired during a marriage. As a result, the starting point is that they should share equally in all matrimonial property.

The Court of Appeal decided that the source of the asset is the critical aspect, not in whose name it is held, and so held that a large proportion of it was 'non-matrimonial'. If an asset is 'non-matrimonial' it means that it has been brought into the marriage by one spouse only. Non-matrimonial assets are less likely to be shared equally. It may be possible to

argue that that resource should be ring-fenced or otherwise preserved for the party bringing it into the marriage.

However, the Court of Appeal found that at least a portion of the gift (which had increased in value during the marriage) was generated during the marriage and so matrimonial property capable of being shared.

Note: Even if an asset is 'non-matrimonial', a divorce settlement is always subject to the court's discretion and the issues outlined in s25 Matrimonial Causes Act 1973. If there is insufficient wealth, it may not be possible to "ring-fence" or protect non-matrimonial assets. But for wealthy individuals, such as Mr and Mrs Standish, the distinction between what is capable of being shared as matrimonial assets – or not – is crucial to the ultimate settlement.

3. Always consider a post-nuptial agreement.

A post nup operates in a similar way to a pre nup.

There is a clear tension between what the family lawyers may seek to achieve (protecting the source of the asset and limiting sharing claims for the gifting party) and what the financial advisors and private client lawyers seek to achieve (minimising tax and showing that there is no retained interest in the asset). However, a post nup must always be given consideration at a time when an assets transfer is being contemplated - even if it is subsequently discounted for fear of it undermining the tax planning exercise.

A post nup could make clear whether a transfer of resources is fully intended by

the parties to be an outright gift or some form of "conditional" gift arrangement. This intention may affect a later claim that the source of the wealth protects it from being shared on divorce, and could affect the efficacy of the tax planning but at least the parties would have clearly weighed up the pros and cons.

Summary

We will find out how the Supreme Court approach the division of assets for Mr and Mrs Standish later this year.

Whatever the outcome, the main lesson to be learned is this: Look at the situation in the round, with advisors from across the spectrum. Failure to do so could cost you dearly.

Fiona.Davidson@Weightmans.com

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As expert Auctioneers & Valuers, Outhwaite & Litherland have been supporting North West Lawyers and professionals with valuations and advice since 1907.

We offer a complete probate valuation service, which now includes RICS accredited property valuations, in addition to the existing valuation service, estate sales and property clearance.

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Top tips for maximising the power of your data

Legal cashiers perform the most important back-office role in any law practice. The criticality of keeping your accounts pristine and compliant cannot (and should not) be overstated.

Law firms using LEAP Legal Software, integrated with Microsoft's Power BI tool, backed by the Jayva Global consultancy and training team have access to impactful data visualisations, analytical insights, business-intelligence reporting and statistic-driven decision making. This article explains why...

LEAP's the first-and-only Microsoft-certified Power BI connector for legal software

On 25th April 2024, LEAP announced its prestigious accolade of developing and certifying the inaugural Power BI connector in the legal software industry. This achievement is testament to the LEAP development team's sterling efforts to always make the latest software innovations available to its users in order to add value to their businesses.

Jayva is LEAP's trusted certified consultancy partner

Having launched in 2014 as LEAP's first certified consultants in the UK and globally in 2018, we supply the full range of implementation services including installation, configuration, training and ongoing helpdesk support in the UK, USA, New Zealand, Ireland and Australia.

LEAP and Jayva work together hand in hand – LEAP supplies the software; Jayva supplies the accompanying technical services. In terms of Power BI, our trio of offerings span training, support and report creation.

Power BI is an analytics tool for optimum business intelligence

Power BI is made up of a collection of apps, connectors and systems that combine data from various sources – such as Excel spreadsheets, cloud-based

data warehouses and on-premise data warehouses – into interactive, visually immersive reports within a single data source.

With LEAP integrating smoothly with legal accounting software such as QuickBooks Online and Xero, this centrally stored data is financial too, thereby giving an at-a-glance snapshot of what's happening in a law firm's back-office accounts function as well as in its front-office, client-facing division.

Power BI is a cost-effective purchase

There's a free version of Power BI, called 'Power BI Desktop' which is recommended alongside either a 'Power BI Pro' or 'Power BI Premium' licence. Licences are only needed for software admin users to create reports for firm-wide circulation.

Rolling out Power BI is ease personified

It's super easy to implement Power BI and connect it to your LEAP data. Head to Google or the Microsoft App Store and search for 'Power BI Desktop'. Download this free desktop version to your device locally, open the application, find your data source and connect the two systems by entering your LEAP credentials.

Power BI comes with popular-and-customisable reporting templates

In your LEAP-Power BI combined solution, there's a range of report templates covering fee earner, practice-wide, matter and financial performance. These reports can be tailored by using as a base and building upon it thus making reporting even more powerful. This is where Jayva's report creation services come in. To discover more, please email info@jayvaglobal.com.

Power BI's benefits are extensive and assorted

Having already covered some of the benefits of Power BI above, further advantages comprise the ability to...

- **Make informed decisions.** By pulling in data from every origin, make predictions about the future and form decisions that stand the test of time.
- **Increase efficiency.** You'll save valuable time on management information reporting and its examination to run your practice smarter.
- **Strengthen customer service** by concentrating on what matters to your business – excelling at delivering legal advice.
- **Boost revenue and profitability** by being more financially savvy, allocating resources optimally and operating more efficiently.
- **Enhance data quality.** Input data once then combine, cleanse, shape and format for accurate, actionable observations.
- **Access data easier.** Power BI becomes your single source of truth by aggregating data from separate systems.
- **Plan strategically.** Analyse vital metrics to fuel continual improvement throughout your business.
- **Perform benchmarking.** Compare statistics with those of your rivals to ascertain where you stand in your industry.
- **Gain competitive advantage.** Utilise your data's benchmarking insights to become a competitive force to be reckoned with.
- **Know your business inside out.** With real time, up-to-date data that's constantly refreshed, you'll have a much better feel for what's going on in your company.
- **And much more besides,** from avoiding compliance hazards to reaching ROI on your existing software, and lots in between.

Continues over page...



Specialist training support for your law firm

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- + Benefit in many more, expansive ways



“The training of super users was a genius stroke. It spreads the technical know how around and prevents one sole person being inundated with system queries.”

Andrew Horwich, Symes Bains Broome Solicitors

“Our Jayva trainers showed us around the software features relevant to our diverse roles in practice. The staff are friendly and efficient which is a formidable combination.”

Andrew Gray, Truth Legal



Get in touch to learn more:

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Top tips for maximising the power of your data continued

There's a bright future ahead for LEAP-Power BI clients

If you're wondering what's next in the Power BI journey, here's a summary of things to look forward to...

- **Increase knowledge and expertise.** With Power BI being in early adoption stages in the LEAP setting, knowledge and expertise is growing exponentially. Although already achieving amazing results in law firms, this will keep getting better.
- **Introduce more extensive date ranges for transactional**

information. The future will bring the ability to compare prior years, trends and more.

- **Welcome custom templates pulling in multiple data sources (QuickBooks Online, Excel etc).** We're testing the benchmarking scenario to pull in data cells based on an expected standard for specific area specialisms so look out for a plethora of new custom templates.
- **Add extra end-points such as custom fields.** Extra end-point data is being incorporated, particularly surrounding data protection, anti-money laundering compliance and

know your client conflict checking. Watch this space.

Jayva is willing to lend a helping hand

To discuss anything you've read in this article – whether it's considering your software options, project managing LEAP and Power BI-related software upgrades, training and mentoring software users, whatever – please email Jayva at info@javaglobal.com or visit www.javaglobal.com/power-bi-consultancy.

Read this article in its entirety at www.javaglobal.com/news/maximizing-the-power-of-your-data.



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Southport BID Company



Rachel Fitzgerald

Southport Business Improvement District invites you to Professionals of Southport Social

Every town and city in the country is undergoing a period of substantial change mainly driven by changes to the economy.

The way in which we use our town centres – for shopping, work, and leisure – has altered faster than many could have predicted (source: The High Streets Task Force, 2023).

Yet, one thing that hasn't changed is that places with Business Improvement Districts (BIDs), such as Southport and Liverpool, generally perform better than those without any such sustainable funding model and strong business network www.southportbid.com

There are now more than 330 BIDs in the UK, the majority in town and city centres in England. In the North West, there are three BIDs in Liverpool, one in Halton, one in Chester, one in Blackpool and two in Manchester as well as Southport. The BID movement is influential locally, regionally and nationally and is making a real difference to the places where people live, work and play.

Southport is a town built on the



YOUR SOUTHPORT

foundation of health and wellbeing. People want to live in a beautiful place that also enables them to lead a healthy life. Southport is a place people visit, to breathe, restore, and re-energise. Southport is a place for work and a place to invest. Thanks to pressure from the BID, the town's businesses can now take full advantage of the city region's new superfast broadband network making it an even more attractive place for business.

Southport is a town that offers a healthy work-life balance. And this is Southport's unique offer - a place where people can do business, be healthy and live well and we proudly promote this as distinctive within the Liverpool City Region, the North West and the UK.

Southport BID is the only organisation in Southport which provides a sense of community exclusively for town centre businesses, representing your views, lobbying in your interests and even providing you with some of the resources you need to make trading decisions (e.g. footfall, economic

trends, changes to legislation etc). Southport BID organises sector focused events and our next Professionals of Southport Social event will take place on 27th February at 5:30 pm (refreshments served from 5:30 pm) hosted by one of Southport's newest venues Penelope's on the Park.

The host speaker at the event will be **Tony Howard**, co-founder of GSL and the developer of The Cove Resort Southport. The Cove Resort is an exciting £75m leisure and hospitality project, which aims to bring a high-quality visitor attraction to Southport, focussing on health and wellbeing, where multiple leisure activities including surfing, and an extensive thermal spa will form part of the offering.

.....
If you are already doing business in Southport or you are looking to expand your business to Southport please join us. To book your free place please book here or email rachel@southportbid.com



Vauxhall
Community
Law &
Information
Centre

The latest news from Vauxhall Law Centre. Providing Access to Justice in the community since 1973.



Christmas celebrations

Christmas has been and gone sadly, but we all had a chance to celebrate together before we took a short break. There was plenty of homemade food and plenty to celebrate. Last year from January to December our staff were able to recover a huge £4,745,579.25 in entitled income for our clients, an incredible amount for our team, who are all incredibly proud of their work. Here's to the next 12 months!

JMU Students/ volunteering

Before Christmas, we were joined by five student volunteers from John Moores University, who were here for a 10-week placement. While here, each of the volunteers helped us in a variety of roles, helping us triage our enquiries, giving guidance over the phone, and arranging appointments for our clients.

During this time, we struggled with an overwhelming number of enquiries, and they were indispensable in giving crucial help to those who rang or contacted us.

Further to this, they also joined some of our advisors in their posts at our Outreach services. **Shannon**, one of our Housing advisors was joined in her post at the British Red Cross where she offers advice to those seeking asylum, or recently given leave to remain. Each of the volunteers was also given the opportunity to shadow our Welfare Rights advisors in appointments with their clients, with some then switching roles, as they were supervised providing help to clients themselves. We're so proud of this achievement for them.

A massive thank you from everyone at the Law Centre to **Sean, Hannah, Jack,**

Amy & Gerarda for all of their dedicated hard work, and hope to see you soon!

Case study/ Tom Joining Law Centre

In not-so-recent news, we welcomed to the team our new Housing Supervising Solicitor, **Tom Lavin**, near the end of last year. Tom, pictured with our Asylum Support and Migrant Housing Caseworker **Shannon**, brings with him a wealth of experience in Housing legal practice, having most recently worked at Greater Manchester Law Centre as a Housing Solicitor, and previously being a Justice First Fellow training under our own **Mary Heery** in her tenure at Merseyside Law Centre. Tom is a passionate campaigner on housing and tenant rights and has already been hard at work on behalf of our clients.

Our Housing team have had some recent



Shannon with Tom Lavin

success with some of their clients. Here's a case study they've given us to demonstrate just how valuable this work can be:

We met our client in April 2024 during our outreach session at Merseyside Refugee Support Network. She is a refugee from Sudan, granted status after fleeing war and unimaginable trauma. Despite her severe PTSD, diabetes, and an above-knee amputation requiring wheelchair use, she was placed in unsuitable accommodation by the Home Office and left to fend for herself.

With no family or support, she relied on the Sudanese community in Liverpool for aid, but was forced to leave after a fall in the unsuitable home she was staying in. She reached out to the council for homelessness support but had received no response, and by the time she came to us, she was in severe distress.

We immediately requested the council fulfil their legal duty to provide her with housing, after which she was placed in temporary accommodation. However, this was outside of Liverpool, isolating

her from the friends who helped her with basic needs like bathing and eating. We asked the local authority to secure accommodation for our client in Liverpool, but they said that this was not possible due to a busy week with high-profile sporting events happening in the city. After further action, however, we were able to ensure she was given suitable accommodation in Liverpool.

We supported her further in applying for Personal Independence Payment and demanded a proper care assessment after previous attempts failed due to the absence of an interpreter. This advocacy resulted in a care plan, providing essential daily support.

The council eventually acknowledged their duty to her but initially backdated their decision incorrectly, delaying her access to permanent housing options. We successfully challenged this, ensuring her priority status for bidding on a permanent home.

Today, she remains in temporary accommodation, waiting for the stability of a permanent home.

Outreach Work

Back in November, we started our first drop-in advice sessions based in Spirit of Shankly's (LFC Supporters Union) offices, right next to Tiber Square, where every Thursday Fans Supporting Foodbanks manage their weekly food pantry. We wanted to be able to offer advice to those who are struggling with their finances, and need urgent advice on Welfare Benefit matters.

Danielle, our outreach advisor has been helped by another of our Volunteers – **Bothale**, who has been sitting in with

Danielle, ensuring clients are arranging appointments appropriately, and gaining experience in Welfare Rights work. Anyone can drop in between 10 AM – 2 PM every Thursday.

Additionally, our very first Friday session over on the Wirral at WEB Merseyside, providing advice appointments for Welfare Benefit matters to their service users began last week. With plans to expand the service further in the future into other areas of advice practice, we hope this will be the start of an exciting new project!

Can you help Vauxhall Law Centre?

We would be grateful if you could support our organisation's work by [making a donation towards our charity](#), helping us to continue providing access to justice to those who need it most. As a charity, we are reliant on funding and donations. Without this, we would not be able to meet the increasingly high level of demand on our services.

[Further information can be found on our website.](#)

Alternatively, if you think you or your company can support our work at VCLIC, please don't hesitate to contact us. We are looking for volunteers with skills in a wide range of areas such as Financial Management, HR, Technology, Fundraising, and Advice. If you have any skills and would like to get on board with us, please drop us a line at recruitment@vauxhalllawcentre.org.uk

Please consider using volunteering as a means to meet some of your company's Corporate Social Responsibility commitments and support the local community.

Regulation Update

February 2025

The latest Regulation news from Andrea Cohen of Weightmans LLP



Andrea Cohen

As we come out of the freezing weather (for now!), Compli is back with our monthly round-up of developments in the world of risk and compliance, regulatory matters and disciplinary decisions.

SRA reports

When most of us were trying to wind down and relax as much as possible just before the Christmas and New Year break, the SRA went into overdrive, producing a raft of reports that you may well have missed, particularly as they were all published on its website on 19/20 December 2024. These included:

[SRA | Our Annual Reports for 2022/23 | Solicitors Regulation Authority](#)

[SRA | Upholding Professional Standards Annual Report 2022/23 | Solicitors Regulation Authority](#)

[SRA | Upholding Professional Standards – Diversity Monitoring Annual Report 2022/23 | Solicitors Regulation Authority](#)

[SRA | Education and Training Annual Report 2022/23 | Solicitors Regulation Authority](#)

[SRA | Equality, Diversity and Inclusion Annual Report 2022/23 | Solicitors Regulation Authority](#)

[SRA | Client Protection Annual Report 2022/23 | Solicitors Regulation Authority](#)

[SRA | Authorisation Annual Report 2022/23 | Solicitors Regulation Authority](#)

[SRA | Risk Outlook report: Serving clients' needs in a changing legal market | Solicitors Regulation Authority](#)

In addition, there were a large number of other publications in December. In its Professional obligations thematic review, published 13 December 2024, the SRA found that firms tend to review regulatory resources on a reactive basis and there is a lack of systemised dissemination of SRA resources. In addition, and some would say, an explanation for the findings, is that many solicitors said they found it difficult to navigate the website and find information. Even those of us whose role and areas of expertise mean we spend considerable time on the SRA website find it difficult to navigate, and are made aware of publications from colleagues, or make other colleagues aware of findings on LinkedIn!

SRA warning on marketing legal services to the public

The SRA recently issued a warning notice regarding the regulatory responsibilities and obligations when marketing services, particularly making reference to unsolicited approaches in breach of rules by cold calling, door knocking and directly targeted online messaging, and inaccurate or misleading publicity and marketing material [Marketing your services to members of the public](#). Interestingly, the SRA headline link to the warning notice reads 'Warning notice calls out 'no win, no fee' agreements', but the content does not appear to do so. It confirms there should be a clear explanation of what 'no win, no fee' means, and the risks to clients in relation to potential liability for costs, but does not 'call them out'. The notice includes links to previous guidance on unsolicited

approaches, claims management, and representing clients during claims for financial services or products, and the warning notice on high volume financial services claims.

Sham litigation

The SRA has published a guidance note on the potential threat posed by sham litigation [SRA | Sham litigation | Solicitors Regulation Authority](#). It confirms that litigation is not within scope of MLR, but all firms, whatever legal services they provide, are subject to the Proceeds of Crime Act 2002 (PoCA). The guidance provides information as to how sham litigation works, key indicators to help spot potential sham litigation and steps firms must take, including identifying clients (8.1. SRA Code of Conduct for Solicitors), keep detailed records (Rule 8.1, SRA Accounts Rules) scrutinise account policies and procedures (2.1 SRA Code of Conduct for Firms) and submit a SAR to the NCA if you have suspicions of money laundering. The guidance also warns about not over-relying on E-verification.

Automatic disclosure of documents in the SDT

A new policy has been introduced by the SDT to automatically disclose core documents to the press and public at the start of the hearing, to improve the transparency of hearings and reduce costs to reduce the number of non-party applications for disclosure (NPDs). Under the new process, specified classes of documents, including the rule 12 statement of allegations and facts by the SRA, other than exhibits and any anonymity schedule, the answer without exhibits, and the reply and skeleton arguments, will all be disclosed by being put on the tribunal's website during the hearing and for a period afterwards. Revised practice directions will also give parties more time to understand the case before giving a reply or answer and before the hearing date is set.

Reminder – SRA Consultation responses by 21 February 2025

The closing date for responses to the SRA consultation on potential changes to how client money is handled in the legal sector is 21 February 2025. The consultation is divided into 3 parts, solicitors holding client money, protecting the client money that solicitors hold, and delivering and paying for a sustainable compensation fund. A number of people have commented that the consultation period is short, taking into account the complexity, length, width of areas raised, and the numbers who will need to be involved in preparing considered responses, and have asked the SRA to extend the closing date, bearing in mind how long the SRA had taken to compile the consultation, following feedback received after publication of its Consumer Protection Review discussion paper in February 2024. At a recent SRA roundtable discussion, the SRA representative said he would take the request away to consider, but it is unlikely that the closing date will be changed. There have been a number of meetings to discuss the issues, including the recent MLS COLP/COFA/MLRO Forum, Law Society committees, local Law Societies etc, as well as the SRA meetings. The proposals are wide reaching, and it is important that as many as possible engage in the process and respond to at least part of the consultation.

Disciplinary and regulatory decisions

Fines for AML breaches continue, including:

Solicitor fined £27,500 over AML compliance failings

A partner who failed to conduct adequate client due diligence while handling a property transaction has been fined. The solicitor also failed to conduct sufficient ongoing monitoring of the business relationship with the client and acted in transactions involving fraud. In the same case, the COLP was cleared of failing to adequately investigate concerns that the development was fraudulent, the SDT deciding that he was justified in relying on assurances made by a senior property partner.

Maximum fine for firm for AML breaches
A firm has been fined £25,000 and £1350 costs for failing, for six years, to have an appropriate risk assessment and policies, controls and procedures in place to manage the risk of money laundering. The issue was discovered after an SRA risk-based review in October 2023 and referred for formal investigation. The firm cooperated with the investigation, took remedial action and now has compliant documents in place.

ABS fined over £27,000 for AML breaches

A firm that did not have a risk assessment and PCPs in place for 7 years, from 2017, has been fined more than £27,000, with £600 costs. The SRA said the firm showed no regard for its obligations and had the potential to cause harm by facilitating dubious transactions, although there was no evidence of harm to clients or third parties. The firm had implemented compliant processes 'promptly' after feedback was provided, and cooperated fully with the investigators.

Solicitor suspended for failing to pay earlier fine and accounts breaches

A sole practitioner, the COLP and COFA for the firm, has been suspended for one year after failing to comply with a 2020 tribunal order to pay a fine of £10,000 and repeated breaches of SRA accounts rules, including shortages on client account and transfers from client to office account on 7 occasions without submitting a bill. The suspension will be suspended for two years if a range of conditions are complied with, including stopping holding client money and holding a compliance office role for an indefinite period. He also has to pay SRA costs of £27000.

SDT allows solicitor who backdated letter to continue in practice

A solicitor who backdated a letter to make it appear that work had been done on a file when in fact it had not, and was dismissed from the firm for gross misconduct, has been suspended from practice for one year, suspended for two years, and ordered to pay £10,000 costs. The solicitor had been struggling with the volume of work and backdated the letter to avoid a colleague chasing the work. The SDT stated that 'the

act of dishonesty was an isolated incident' though 'it was nonetheless capable of affecting the reputation of the profession.'

Partner fined for using client account as banking facility

A partner has been fined £14,000 for authorising the firm to make payments totalling over £570,000 over 18 months on behalf of four clients where there were no underlying legal transactions, in breach of rule 3.3 SRA Accounts Rules.

Struck off for payments to personal account

A solicitor who told clients to pay money to his personal account, deleted emails requesting payment, created false invoices, lied to clients and created a false audit trail on the firm's system has been struck off. The solicitor admitted acting dishonestly and apologised for his misconduct. He said the money, totalling around £1000, had been repaid. Due to his financial situation, the SRA did not seek costs.

Struck off for trying to save client SDLT and a potential claim

A partner who asked the seller's solicitor to backdate completion by one day, to the final day of the 2021 SDLT 'holiday' to save the client paying £6000 to HMRC, and 'to avoid a claim', has been struck off. The monies had been in client account but not transferred until the following day due to the volume of work for the accounts department and he had not checked the monies had been sent. He admitted lack of integrity but denied dishonesty. The SDT accepted his remorse was genuine but there were no exceptional circumstances to justify from departing from the usual sanction in cases of dishonesty.

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

Influence the future of mental health in the legal sector

Life in the Law 2025
Take part in the survey now



lawcare.org.uk/survey

LawCare

Take part in LawCare's Life in the Law 2025 research

LawCare, the mental health charity for the legal sector, has launched its new *Life in the Law 2025* surveys and invites you to take part.

There are two separate surveys: one for individuals in the legal sector, and another for organisations, such as law firms, chambers, and in-house legal departments.

The surveys are anonymous and take approximately 10 to 15 minutes to fill out.

- Complete the [Life in the Law 2025 survey for individuals](#)
- Complete the [Life in the Law 2025 survey for organisations](#)

The surveys are open until Friday 21 March.

Elizabeth Rimmer, CEO of LawCare

Elizabeth Rimmer, CEO of LawCare, says: “*Life in the Law 2025 is a real opportunity to improve mental health in the legal sector. These surveys are open to everyone working in law, and they’ll help us understand why people in our sector may be experiencing poor mental health and what practical steps organisations and individuals can take to prevent this. By sharing your experiences, you’re contributing to building a more supportive and healthier working environment for the future. Together, we can make a real difference.*”

Your voice adds strength to the findings. The research isn’t just about data. It’s about people in the legal sector: their experiences, challenges, and successes. Your insights - whether as an individual navigating the challenges of legal work or as part of an organisation striving to support colleagues - are vital.

The surveys are confidential, which means your answers will remain anonymous. Your participation is crucial to the development of practical, evidence-based recommendations that will lead to improvements in working practices to better support mental health.

The survey findings, along with evidence-based recommendations, will be shared in October 2025.

Who can take part?

The surveys are open to individuals and organisations in the legal sector in the UK, Jersey, Guernsey, and Isle of Man, and ask about:

- Working hours and job pressure
- Burnout
- Mental health and wellbeing at work
- Bullying, harassment and discrimination
- Your future in the legal sector
- Current workplace measures to support mental health and wellbeing

If you have more questions about *Life in the Law 2025* see the [FAQs on the LawCare website](#).

LLS to be awarded Freedom of Association

Liverpool Law Society are immensely proud to announce that it will be granted the Freedom of Association by Liverpool City Council; an accolade to recognise and celebrate the work of LLS in promoting and facilitating access to justice for the most vulnerable in society. The award is the equivalent of the Freedom of the City, an honour bestowed upon individuals in recognition of their contributions to the City of Liverpool and its people. The Society has requested the ceremony be held in 2027, which is an important year as we launch our bicentenary celebrations to mark 200 years of LLS serving the local legal community as a representative body.

The Society has had a longstanding history of providing access to justice. Between the two world wars, the society implemented the 'Poor Mans Lawyer' scheme which provided free legal advice to those who needed it. In 1973, the Society and Liverpool

City Council established the Vauxhall Law Centre, in one of the most deprived areas in the Country. The Law Centre was one of the first in the Country and is now over 50 years old and still going strong, and the links to this Society remain strong too. Our president from 2019-21 is on the VLC board currently. In 1981, a further Law Centre was established in Liverpool 8 as an initiative of Local Community and Church leaders and the Society was also strongly involved in its establishment. Recently, through the Society's Access to Justice Committee, a new Wirral Advice Centre has launched in Birkenhead in January 2025, assisted by Vauxhall Law Centre and WEB Merseyside.

In 1989, the city went through one of the darkest times with the Hillsborough disaster, which prompted the launch of the Hillsborough Justice Campaign. After many years of tireless campaigning, Hillsborough Law is scheduled to be introduced this year.

The Society continues to play a role with local issues raised by its membership and coordinates meetings with Directors of the Society and local MPs to discuss the issues affecting the Liverpool Legal Community and those who come to them for legal assistance.

The Bicentenary:

In 2027, LLS look forward to welcoming the local legal community and beyond to a varied program of events to reflect upon and celebrate the progression of the Society as it has gone from strength to strength over the last 200 years. The Society now proudly has circa 2400 members and is one of the largest local Law Societies in England and Wales, enjoying links with other regional Law Societies.

Anthony Neild

Costs Lawyer, JMW Solicitors LLP
 Director & Public Relations Officer of LLS
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Charity Spotlight: **Sahir** WELL+PROUD

Celebrating 40 Years of Community Support and Advocacy



This year marks a significant milestone for Sahir, as we mark 40 years of service, advocacy, and support. Since the 1980s, we have been championing the rights and well-being of LGBTQ+ individuals, those living with HIV, and others in need across the Liverpool City Region; expanding our support as time went on and the need for them increased.

A Legacy of Support and Inclusion

Sahir was created at a time when public awareness and understanding of HIV was limited, and stigma was widespread. From the very beginning, our mission was to provide a safe and supportive space for people living with HIV, offering essential services to combat isolation and discrimination. Our holistic approach addresses physical, emotional, and social needs, ensuring that everyone who comes through our doors feels seen, heard, and valued.

One service user recently said of our regular Social Space, *“There is a space you can come to once a week and band ideas, as well as provide constructive feedback. I know I’m not alone.”*

Today, Sahir serves as a lifeline for many, offering counselling, peer support, and



educational programmes that empower individuals to live fulfilling lives - creating a community where acceptance and compassion thrive.

Pioneering LGBTQ+ Services

From educational workshops and support groups to advocacy initiatives, Sahir aims to break down barriers and build understanding. These services are particularly crucial in addressing the unique challenges faced by LGBTQ+ individuals, such as mental health

disparities, discrimination, and access to healthcare.

Someone who has recently accessed our counselling services said, *“Through counselling, I gained a better understanding of myself and developed the strength to not let my history define me.”*

We collaborate with local partners to ensure that LGBTQ+ individuals receive the care they deserve without fear of discrimination or bias. For example, our peer support groups have helped countless individuals build coping strategies, seek the support they need, and create lasting bonds.

We also take pride in our outreach efforts, which bring vital information and resources to those who may not have easy access to support networks. This includes engaging with schools, workplaces, and community groups to create inclusive environments and grow understanding.

We are proud to support LGBTQ+ people seeking asylum with their asylum process, with one individual recently saying, *“I have recently been granted refugee status, a milestone that has given me a sense of freedom and the chance to rebuild my life. Sahir’s dedication and kindness has been invaluable to me.”*





Bringing the Community Together

In addition to our support work, Sahir has been involved in organising community events that honour and uplift the voices of those we serve. We annually coordinate Liverpool and Wirral's World AIDS Day vigil, which provides a space for those affected by HIV/AIDS to come together and remember those we have lost. Last summer, we organised 'Access Pride', an accessible fringe event as part of Liverpool's Pride celebrations, where people could attend knowing there would be no alcohol, a quiet space, and feel part of Pride without feeling overwhelmed.



We had the privilege of coordinating Liverpool's vigil for **James Lee Williams**, also known as **The Vivienne**, a beloved local icon, celebrated drag performer and an incredible champion for Sahir, in collaboration with his family. The vigil brought together people from all walks of life to celebrate James's legacy in living your authentic self.

It was a poignant reminder of the importance of coming together in times of grief, with speakers sharing heartfelt stories, memories and funny moments. The overwhelming sense of community highlighted the vital role Sahir plays in bringing people together.

Celebrating 40 Years: A Vision for the Future

As we reflect on our 40-year journey, we are grateful for the incredible support we have received from the community. This milestone is not just a celebration of our past but a call to action for the future.

We are determined to grow and innovate our services, and continue advocating for a society where everyone can live authentically and with pride.

How You Can Help

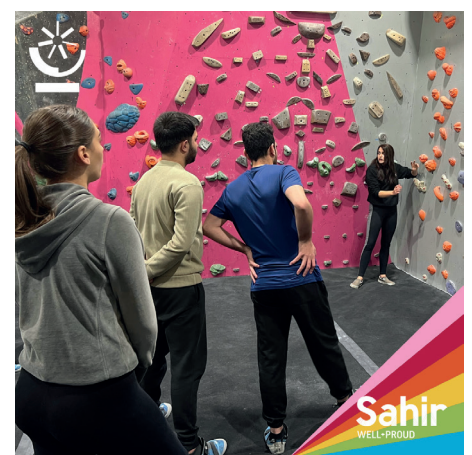
Sahir's work would not be possible without the generosity of individuals, businesses, and organisations who believe in our vision. Whether through volunteering, donations, or simply

spreading the word, your support can make a huge difference.

Volunteers play a crucial role, from supporting our peer support groups to helping organise events. Donations, no matter the size, directly support the delivery of our services, helping us to reach more people. By spreading the word about Sahir's work, you can help amplify our message and inspire others to join us.

To learn more about us, our services, or ways to get involved, please visit our website at sahir.org.uk or follow us on social media @SahirHouse.

With your support, we can continue to make a difference in the lives of those we serve. Thank you for being part of our journey.



New Year Costs Resolutions



Kris Kilsby

It is that time of year to reflect on the achievements of 2024 and to consider the opportunities that may present themselves in 2025. Resolutions can often easily be broken but keeping them small and manageable can mean that you can stick to them. With that in mind, below are three costs resolutions all good litigators should consider.

Embracing ADR and Mediation

2025 is likely to be the year where ADR and mediation come to the forefront and become regularly used to resolve all manner disputes, including costs. This is especially true following the obiter remarks made by **Master McCloud** in her final judgment in the case of *Elphicke v Times Media Ltd* [2024] EWHC 2595 (KB).

Whilst the main body of the judgment dealt with a number of issues, including whether a judge can take into account conduct of a party which takes place after a claim has been discontinued, the final Order that **Master McCloud** made included a provision ‘that the parties must engage in alternative dispute resolution as to the costs’ and that this should happen before either party resorts to proceeding to a detailed assessment hearing.

This is further evidence that the Courts are taking a far more active role to encourage parties to engage in ADR at all levels in an attempt to reduce the costs involved in

such disputes and save the significant time and expense of the Court’s own precious and scant resources.

Draft detailed file notes contemporaneously

Turning a resolution into a habit can be very difficult, however, I cannot stress the importance of keeping high quality, contemporaneous file notes. Making sure to prepare a file note following a telephone attendance or finalising that Schedule of Loss may seem like something that you can come back to later when there is less time pressure on your day, but, failure to do so can result in significant sanctions.

This was evidenced by the recent judgment of **Costs Judge James** in the matter of *Kapoor v Johal*. This was a long running neighbour dispute which was contested by the parties over a number of years. A Bill of Costs was drawn up and served and the Paying Party raised a number of serious issues with the preparation of the Bill of Costs with a number indicative of serious conduct issues. One of these was serious issues was in respect of the file of papers and the time that had subsequently been included within the Bill.

One example identified by **CJ James** related to the attendance at a hearing. Interim statute invoices had been raised to the receiving party and included a fixed fee for a clerk to attend the hearing along with Counsel. However, the Bill of Costs included time for a Grade A fee earner attending the hearing. **CJ James** examined the file of papers and found a number of file notes relating to the hearing. **CJ James** noted that the file notes and correspondence seemed to be conflicted and upon closer examination deduced that the file notes had been amended and a different font had been used. **CJ James** stated that “*The impression given is that the file has been supplemented with scores if not hundreds of attendance notes created much more recently. I cannot overstate how serious that is.*”

This was one factor out of many that contributed towards a Bill of Costs totalling £258,583.78 being assessed at nil.

Obtain your Client’s permission before deducting costs from damages held

The Solicitors Act 1974 provides a number of protections for solicitors against assessments being sought by Clients. One of the most important protections comes in the form of the bar put in place for a Client to obtain an order for assessment of their Solicitor’s bill of costs once 12 months have elapsed following the date of payment of that bill. This is designed to provide Solicitors with assurance that once 12 months have passed that the costs that have been billed and paid can not be challenged, important for any firms cashflow.

In *Oakwood Solicitors Ltd v Menzies* [2024] UKSC 34 the Supreme Court had to consider what action needed to be carried out by a Solicitor to raise payment and to start that 12 month clock ticking. The Supreme Court found that it was not sufficient to just raise an statute invoice, serve this on the Client and then proceed to deduct the costs from the funds held on account (regardless of the terms of the retainer entered into). Instead, consent needs to be obtained from the Client to proceed to retain the funds held on account to use against the Bill of Costs to be paid.

Therefore, to ensure that the protections afforded by the Solicitors Act can be used effectively it is important to ensure that the Client’s consent is obtained to use funds held on account to pay any bill that is raised.

Kris Kilsby is a Costs Lawyer at Paramount Legal Costs and a Council member of the Association of Costs Lawyers. For any further questions or queries about costs and detailed assessment please get in touch at Kristopher.Kilsby@paramountlegalcosts.co.uk.



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Money Penny launches new call tracking service to help legal firms unlock marketing return on investment

Money Penny has launched a new call-tracking service to help legal firms identify which marketing campaigns, ads, web pages, and specific keywords drive phone calls to their business.

The innovative solution is the first to be created in partnership with Ruler Analytics, a specialist marketing measurement platform.

In today's competitive landscape, phone calls are still one of the most valuable forms of customer engagement, and understanding how they are generated is crucial to maximising marketing return on investment (ROI).

With Money Penny's Call Tracking service, legal firms can now track the journey of each call back to its source. This provides a clear picture of which marketing strategies are performing best and how Money Penny is adding value.

Key Features of Money Penny's Call Tracking:

Comprehensive Call Attribution: Gain full visibility into which campaigns, ads, landing pages, and keywords drive the most valuable calls, enabling smarter marketing decisions. Integrating this service with legal firms' existing marketing technology allows them to connect all call data back to their campaigns, refine strategies, and maximise ROI.

Professional Call Handling: Legal firms will not only know where calls are coming from but can also ensure that Money Penny's expert team answers every call promptly and professionally, delivering a seamless customer experience.

Seamless CRM Integration: Connect call data to in-house CRM systems to track conversions and monitor the true return on investment (ROI) across all marketing efforts—whether PPC, SEO, or paid social.

Optimised Campaign Performance: Maximise the effectiveness of legal marketing strategies across multiple channels by understanding which tactics lead to high-value phone calls and improving performance across paid search, SEO, and social media campaigns.

Sally Moth, Group Head of Product Marketing at Money Penny, said: "With Money Penny's new Call Tracking service, marketers no longer need to guess which campaigns are performing well. They now have the visibility to see the true impact of their efforts in real time. By combining robust call tracking with professional call answering, businesses can guarantee that every call is answered and that every customer is given a fantastic first impression."

Why Call Tracking Matters

Bernadette Bennett is head of the legal sector at Money Penny, which provides the highest levels of client care to more than 1,000 UK law firms through its telephone answering, outbound calling, and live chat services. She added: "Phone calls are a critical part of the customer journey, particularly for businesses in the legal sector. However, until now, tracking the source of those calls has been a challenge. Our new service allows legal firms to optimise the most effective marketing tactics, allocate budget to the channels that drive results and help them grow."

Ian Leadbetter, CEO of Ruler Analytics, said: "We're thrilled to partner with Money Penny to deliver a solution that enables marketers to bridge the gap between their campaigns and customer engagement. By pairing Ruler's advanced marketing attribution technology with Money Penny's exceptional communication services, we're helping businesses uncover the true ROI of their efforts and make smarter decisions that drive growth."



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Estatesearch Acquires Exizent to Elevate Bereavement Services



- Estatesearch has acquired Exizent, adding Exizent's best-in-class software to its pre-existing market-leading products related to bereavement, probate and estate administration.
- Exizent will continue to provide all its existing products and services in all UK jurisdictions under the new ownership.
- The enlarged Group will make the bereavement process easier for all involved, supporting professionals, and therefore the bereaved, at one of life's most challenging times.
- The acquisition also promises exciting new future innovation for legal, accounting and financial services professionals, streamlining death related processes with enhanced data and technology.

[Estatesearch](#), a leading provider of legal and financial services technology, announces its acquisition of [Exizent](#), the pioneering platform in estate administration and death notification services. This milestone combines two major innovative forces in the space to deliver greater efficiencies, enhanced tools, and better outcomes for private client professionals dealing with probate, financial institutions, and all of their clients.

Over the 5 years since Exizent started up it has established itself as a trusted provider of modern estate administration products, simplifying the bereavement process for legal professionals, financial institutions, and their clients through

their secure, usable and reliable software that supports excellent services to end clients. Estatesearch is a similarly innovative leader in the sectors, offering comprehensive data aggregation and technology solutions that enhance risk management, compliance, and process efficiency, empowering professionals to deliver better client outcomes whilst streamlining operations.

The acquisition of Exizent by Estatesearch creates a unique opportunity to combine strengths, resources, and expertise. Together, they aim to:

- Continue providing excellent solutions to legal services firms and the financial services sector.
- Further invest in product innovation to solve problems and serve future needs.
- Ensure the future of Exizent's trusted platform while leveraging Estatesearch's resources for accelerated growth.
- Provide long-term stability and support to customers and partners.

Aleks Tomczyk, Co-Founder and Managing Director of Exizent, commented:

"We are thrilled to join forces with Estatesearch whom we have known for years. We all believe it is a good match – particularly of vision and culture. This deal ensures that Exizent will continue to deliver the high-quality products and services that our users rely on, whilst gaining the backing of a larger group to accelerate our mission of improving the bereavement process for everyone involved. It is a significant step forward for Exizent and our users."

Nick Cousins, Co-Founder and CEO of Exizent, added:

"This acquisition represents a pivotal moment for Exizent's bereavement notification platform and its usage within the financial services industry. By combining Exizent's strengths with Estatesearch, we can speed up product delivery and innovation for financial institutions, enabling them to provide a better customer journey at a key life moment, manage risk and to work more efficiently. Most importantly, this partnership will enable our users to better serve bereaved families, providing the support they need during a deeply challenging time."

Jonathan Upton, Group CEO of Estatesearch, commented:

"The acquisition of Exizent aligns perfectly with our vision of empowering legal and financial services professionals through innovative data and technology services. Exizent's platform is a natural extension of our existing offering, and the team share our passion for supporting clients in improving outcomes for their customers. We are excited about the opportunities this partnership creates and look forward to collaborating on initiatives that will further drive efficiencies, reduce risk, and improve outcomes for our clients and the wider industry."

Exizent will continue to operate as a standalone subsidiary of Estatesearch, retaining its team and commitment to excellent customer service. Users can expect uninterrupted platform access, with ongoing improvements driven by the combined resources of both companies.


Together, Estatesearch and Exizent are poised to transform the bereavement space by providing cutting-edge tools and seamless support for legal professionals, financial institutions, and their clients.

Forthcoming Courses

DATE	EVENT	SPEAKER
11/02/2025	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	Rebecca Roscoe
05/03/2025	Newbuild Conveyancing: Trips and Traps	Richard Snape
06/03/2025	International Womens Day event	Various
10/03/2025	Inquests and Coronial Law	Nicola 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	Various
20/03/2025	Directors Duties - the fundamentals (including the new voluntary code of conduct)	Jackie Sheldon
25/03/2025	Practical Probate: The Works	Rebecca Roscoe
02/04/2025	Renters Rights Bill	Richard Snape
02/04/2025	Private Child Law Update	Safda Mahmood
30/04/2025	Public Child Law Conference	Various

* 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!



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 & the developments in the case law and statutory provisions.

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](#)


Introduction to Private Client
 with Rebecca Roscoe

'Live' online 4th March, 9.30am - 4.30pm

Are you new to Private Client or a practitioner returning to this area?


This online course is designed to give you an understanding of the day-to-day work of a Private Client practitioner, exploring the preparation of simple Wills, Lasting Powers of Attorney and straight forward estate administration.

Using practical case studies the day will give you confidence when taking instructions, preparing documents and taking a case from start to finish.

What you will learn?

- Key elements of simple Wills including common pitfalls
- Signing Wills effectively
- Preparation of Lasting Powers of Attorney
- Dealing with a simple (non-taxable) estate administration

[Click here for more information](#)


International Women's Day event
 Thursday 8th March, 4pm - 6.45pm

Venue: Royal Liver Building (2nd Floor), Pier Head, Liverpool, L3 1NY

Join fellow professionals, to hear from some motivational and inspirational speakers, celebrating International Women's Day 2025

with refreshments provided & opportunity to network

Chaired by Lauren Cannon, In-House Legal Solutions

With sessions;


Building Resilience in high-pressure environments - Laura Evans, Glass Ceilings Change Management
How to recognise and draw on your secret superpower to break through Glass Ceilings

Overcoming adversity & discrimination - Jaqueline Deans, Exchange Chambers
An Overview of the adversity and barriers faced when pursuing a career in law and whilst practising as a Barrister and how these challenges have fuelled her to break the mold and redefine what is possible.

Be Less Ostrich! - Vicki Harper & Hayley Myers, Evelyn Partners
How to overcome reluctance to deal with our personal finances so we can plan effectively for our financial well-being, both today and in the future

Self Development ... where do I start? - Nadine Stanton, Professional Training
Learn a quick tool to rate your individual development areas and then know what to focus on next and why (Delegates will need a pad and pen!)

Tips I have learnt about the art of career reinvention and squiggly careers - Dr Catriona Wolfenden, Weightmans LLP
From solicitor to professional support lawyer and now Director of Product and Innovation, I've squiggled my way through my career without much of a plan and often no expertise in an area I have stepped into. In this session I will share what I have learnt from saying 'yes' to creating and making opportunities within the same organisation.

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Inquests and Coronial Law

with Nichola Halpin & Gareth Thompson

Monday 10th March, 1.30pm - 3pm. Liverpool City Centre

Join solicitor Nichola Halpin of Weightmans LLP, and barrister Gareth Thompson of St Johns Buildings Chambers, for this discussion on all things relating to inquests. Aimed at those who are curious about the coronial jurisdiction, or want to brush up their understanding of this interesting area of law.

Covering;

- What is an inquest?
- Role of Medical Examiners
- Death Certification Reforms
- Guidance with statement writing
- Guidance with giving evidence
- Conclusions
- Regulation 28
- Article 2
- The right against self-incrimination
- Juries



[Click here for more information](#)



SRA Accounts Rules Update

with Linda Lambert

'Live' online, 11th March, 9.30am - 12.30pm

The SRA expects that all members of the legal profession and their staff follow and maintain certain professional standards. To maintain an informed knowledge, you must also undertake training on a regular basis. Some of this training could be in the SRA's Account Rules, why not do so in 2025?

This is a practical course which looks at the application of the rules as much as the wording of the rules. Ideal for legal cashiers, fee earners, COFAs and managing partners!

[Click here for more information](#)



THE DOMESTIC ABUSE CONFERENCE 2025

WEDNESDAY 12TH MARCH, 12.30PM TILL 4.30PM
HYBRID - ATTEND IN-PERSON OR ONLINE

Drafting Orders: getting it right the first time
Kirsty Leedam, Weightmans

Domestic Abuse: Police Response
DC Rachael Barcas, Merseyside Police

The risks of online communication how best to safeguard against this
James Evans, OurFamilyWizard

The New DAPO Pilot
Nichola Harris, MSB Solicitors

Tech Abuse
Laura Ellis, South Liverpool Domestic Abuse Service

Domestic abuse and children act proceedings
Lauren Maires, St John's Buildings

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[BOOK HERE](#)



Civil evidence and witness statements

with Mike Winston

'Live' online, Friday 14th March, 9.30am - 12.30pm

Understanding how to use evidence to prove things in the civil courts is an essential skill for all litigators. Being able to gather, collate and structure all types of evidence for use in a civil case in a CPR-compliant manner is often the difference between winning and losing when the matter proceeds to trial.

This highly-practical online course will cover in detail:

- case and issue analysis
- understanding different types of evidence
- using/avoiding hearsay
- using objects or documents
- the civil evidence act checklist
- proofing witnesses
- questioning techniques
- listening techniques
- using the witness's own words
- proving things using witness statements
- what to include/what not to include in a witness statement
- the requirements of CPR 32
- witness evidence in the Business and Property Courts
- relief from sanctions when things go wrong



Who should attend? - Solicitors, barristers, CILEX lawyers and all civil litigators from both claimant and defendant perspectives.

[Click here for more information](#)

Liverpool Law Society
Conveyancing Law Update

with Richard Snape

'Live' online Tuesday 18th March, 1.30pm - 4.30pm

Residential Conveyancing is currently undergoing fundamental changes. This online course aims to look at these changes and how to react to them.

Topics covered include:

- **The new TA6 enquiries and potential issues**
- **Announcements in the King's Speech**
- **The Leasehold and Freehold Reform Act 2024;**
 - *Banning new leasehold houses*
 - *Lease extensions*
 - *Changes to administration charges*
 - *Changes to estate management charges*
 - *Changes to rentcharges*
- **Latest on the Building Safety Act 2022 including announcements by the Welsh Government**
- **Changes to planning permission in England and in Wales**
- **Recent case law**
- **Proposed Leasehold and Commonhold Reform Bill**
- **Renters Rights Bill**



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One year on: how LEAP Estates is revolutionising private client support



The LEAP Estates team (Craig Matthews in centre)

Over the past decade, legal technology has seen unprecedented innovation and growth. Cloud-based infrastructure is now standard, and software has become more intuitive and accessible. Yet, the private client sector has often been overlooked, with many providers failing to deliver the functionality modern professionals need.

That's why LEAP Estates was launched—designed as a comprehensive, end-to-end digital case management solution for private client professionals. From estate planning to probate, LEAP Estates delivers tools that streamline processes, boost efficiency, and enhance service delivery.

Since its debut at LegalEx in November 2023, LEAP Estates has reshaped the landscape of private client technology. Attendees at the launch were clear: they had never seen a solution like this. By the end of the year, the development team was actively incorporating user feedback to refine the platform further.

A major milestone came in January 2024 with the integration of WillSuite, the leading will-drafting software. This partnership merged LEAP's powerful legal

software with best-in-class estate planning tools, creating a seamless experience for users. Just two months later, APS Legal became the first client to fully adopt LEAP Estates, a testament to the platform's practical impact on private client practices.

As LEAP Estates gained momentum, its presence at key industry events such as The Best Foundation's Inspiration & Innovation Conference and the Association of Lifetime Lawyers Conference helped forge meaningful connections with professionals eager to elevate their practices. July brought another highlight as LEAP Estates headlined the Modern Law Private Client Awards, underscoring its leadership in the sector.

One of the year's most exciting developments was the release of the software's cutting-edge AI tools. These innovations are revolutionising private client operations:

- **MatterAI** streamlines case management by locating files and details in seconds.
- **LawY**, an AI-powered assistant, provides solicitor-reviewed responses instantly.

- **WillScan AI** extracts data from uploaded documents, automatically populating client records with precision.

These tools are transforming the way private client professionals operate, offering unparalleled speed and accuracy.

The year culminated in a proud moment for the LEAP Estates team, winning Legal Supplier of the Year at the British Wills and Probate Awards. This recognition reflects the dedication and hard work behind creating a product that genuinely transforms the private client sector.

In just 12 months, LEAP Estates has made remarkable strides. But this is only the beginning. Looking ahead, the team is committed to pushing boundaries, delivering even greater innovation, and empowering private client professionals to achieve excellence.

Craig Matthews,
CEO of LEAP Estates

Discover how LEAP Estates can transform your practice at www.leapestates.co.uk

One tray short of a baker's dozen: injury on the production line

Commentary

This case concerns an important boundary matter that sometimes arises for orthopaedic experts in relation to biomechanics and ergonomics. These are areas of expertise for which the orthopaedic surgeon's 'working knowledge' may be sufficient, thereby avoiding the time and expense of instructing a further expert just as in cases where knowledge and experience of orthopaedics in general is sufficient and it is not necessary to instruct an orthopaedic sub-specialist.

Learning points

- In a case where biomechanical or ergonomic issues may arise, it is advisable to explain your knowledge of the subject or subjects.
- Indicate that you will, if you consider it advisable, recommend the instruction of a biomechanical expert or ergonomist and, if appropriate, defer to them.
- Be in a position to give evidence about possible causation in specific situations relevant to the instant case.
- Be in a position to provide references to studies showing a correlation between load and injury.

The case

The pursuer's case was that she suffered loss injury or damage as a result of the defender's fault and negligence. She was employed as a production operative at Mathiesons Bakery in Larbert. To succeed, the pursuer was required to prove that she was engaged in a manual handling operation, that there was a foreseeable risk of injury, and that she was injured by the operation.

History

On 31 May 2020, the pursuer was primarily engaged in work on the production line. On that day, she was instructed to collect twelve trays of cream for use on the production line. The trays were to be collected from a window next to the production line, which formed part of the sanitiser tunnel within the defender's production plant. Each tray contained a ten litre bag of cream. Each tray was plastic and a little wider than the pursuer's body. The pursuer picked up each tray at about hip or waist height and lifted it to almost level with her shoulders. Her arms were slightly extended in front of her. The trolley was to the pursuer's left hand side at

90 degrees to the window from which she was collecting the trays. The pursuer lifted around eight or nine trays and stacked them in turn on a flat trolley. The pursuer immediately felt pain in her back after lifting the ninth or tenth tray from the window. The pursuer continued to work and took all twelve trays to the production line.

The following day when the pursuer got up for work she was unable to get out of bed immediately and fell to the floor when she tried to do so. The pursuer was absent from work for three months and her symptoms resolved within six months.

Skilled evidence

Her skilled witness was a consultant orthopaedic surgeon. His evidence was that, if the court accepted the pursuer's evidence of lifting trays approximately 10 kg in weight from waist height to shoulder height on a trolley to her left resulting in pain in her back, he considered that to be a mechanism that could cause the pursuer to suffer injury.

The skilled witness explained that in the course of studying for the FRCS examinations, there were a number of modules on basic sciences including biomechanics dealing with the operation of the spine, lower limbs, hands, knees and arms. In his evidence in chief he agreed that there was a risk of injury if a female lifted a weight of 10 kg from a low height to shoulder height with her arms partly outstretched. This was evident from basic mechanics and how a load is applied. If a load is at close distance to the spine, if the arms are outstretched the load is further from the spine and the greater the loading on the spine as a result. Risk of injury could be reduced by reducing the load, the height, or the distance away from the spine. That would include not lifting as high or as heavy a load.

In cross-examination, the skilled witness said that the higher the load, the higher the relative chance of injury. He was not immediately in a position to provide references to a study showing a correlation between load and back injury, but referred to health and safety regulations which were very clear about load and risk.



Submissions

So far as foreseeability was concerned, the defender submitted that the skilled witness did not give evidence about the threshold load for the risk of injury and did not give evidence about height and distance in relation to risk. It was submitted that the court required to have evidence about what lesser load and/or height would have avoided injury.

Counsel for the defender submitted that biomechanics and ergonomics are both recognised bodies of knowledge and are separate from the core specialism of the pursuer's skilled witness, a consultant orthopaedic surgeon, notwithstanding that in the course of studying for the FRCS examinations, there were a number of modules on basic sciences including biomechanics. It was submitted that the issue really was one for an ergonomist which the pursuer had attempted to introduce but with which she had decided not to proceed.

Decision

The sheriff, having regard to the skilled witness's training in biomechanics, was satisfied that, in principle, and subject to the ground being laid in evidence, he was qualified to give evidence about risk of injury in carrying out lifting at least at the level of principle as to whether certain types of lifting activity carry foreseeable risk of injury. The problem, however, was that the sheriff was not satisfied on the evidence he heard that the skilled witness was in a position to give evidence about possible causation in specific situations. For example, at what carried weight would the risk of injury in a particular lift be more than de minimis; or again, how many repetitions of a particular lifting operation would give rise to a foreseeable risk of injury, and it was evidence at that level of detail which was wanted and required.

The sheriff's finding was that the pursuer did not suffer loss injury or damage as a result of the defender's fault and negligence.

Link to the judgment: <https://www.scotcourts.gov.uk/media/gmrpnrrk/2024scedin43-agnieszka-swierzko-against-mathiesons-bakery-limited.pdf>

Keith Rix, EWI

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.

ClwydAlyn @ClwydAlyn · 19 Jan
Exciting things are blooming at Llys Erwl!

Our residents have received £50 from Tesco's to buy some equipment needed for their communal gardens' enhancement.

We can't wait to see pictures of the food grown so stay tuned to watch the space flourish! 🌱


#clwydalyn #tesco



63 likes

Napthens LLP
23 January at 00:55

Once again, we were delighted to attend Blackpool town-wide Careers Fair yesterday at Blackpool Conference & Exhibition Centre, for the new Year 9 cohorts ahead of them taking their GCSE options. Merlin Matthews and Lauren Robinson set up our Napthens stand with sweets and merchandise, ready to answer any questions regarding job opportunities to inspire young people across Blackpool!



4 likes

Percy Hughes & Roberts @PHRsolicitors · 15 Jan
Percy Hughes & Roberts are incredibly proud to have supported @CharlottesBrightside throughout 2024. Together, we raised £850 through fundraising activities, covering a whole year of youth club, cookery club, art club & homework club for 50+ young people each week. ❤️



23 likes

Percy Hughes & Roberts @PHRsolicitors · 15 Jan
A heartfelt thank you to Angie and the team at Charlotte's Brightside for their incredible work transforming lives across Wirral. While we look forward to supporting a new charity in 2025, you can still support them below:

#CommunitySupport #Wirral

localgiving.org/charity/charlo...

16 likes

Vauxhall Law Centre @VLCLiverpool · 23 Jan

We were very sad to learn over the Christmas period that our beloved Treasurer Annie Goodman had passed away. Annie was a huge presence throughout the history of the Law & Information Centre since the very beginning. (1/3)



355 likes

Brown Turner Ross
3h

Throwback to our unforgettable Law Society Dinner, where all our staff from our firms in Southport, Liverpool, and Formby came together to celebrate the last year of achievements and set the stage for even greater success in 2025!

From award nominations to hundreds of 5-star reviews, it was definitely a year to remember for BTR! 🥂

#LawSociety2025 #StrongerTogether #CelebratingSuccess



1 like

JMW Solicitors LLP
48m

Last week our JMW volunteers returned to **Bleakholt Animal Sanctuary** after the festive period and spent the morning tending to the animals, looking after the cats, and providing a helping hand around the sanctuary. 🐾

Thank you as always to our CSR team for organising such rewarding experiences for the firm, and we're excited to continue our volunteering partnership with the charity for yet another year. 🙌



Like Comment

CEL Solicitors @CelSolicitors · 23 Oct 2023

Today our Chairwoman Jessica Hampson was interviewed by Matt Allwright on @BBCMorningLive

🗣️ They launched their "Stick it to the Scammers" campaign live from our offices #BeScamSafe #StopScamsUK



2 likes

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editor@liverpoollawsociety.org.uk

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