

# Love, Marriage, Death Conference



St John's  
CHAMBERS



Wednesday, 20th November 2024



1.00pm - 5.00pm

£50 + VAT



Dartington Hall, Devon

CPD:  
3 hours

Our annual **Wills & Succession Conference** will feature talks from our specialist **Wills & Trusts** barristers. This half-day conference will focus on the **rights of married and unmarried couples in life and in death**. We will also be joined by an expert in **predatory marriage**, Daphne Franks.

The seminar is principally targeted at solicitors who are (or would like to be) involved in contentious probate work, but it would also be of interest to non-contentious lawyers, will writing firms and professional executors.

In association with:



## Topics include:

- Cohabitees, Alex Troup KC
- Predatory marriages – a hidden crime, Daphne Franks
- *Oliver v Oliver*: A case update, Joss Knight
- Compromise, ADR and settlement – pitfalls and solutions, Oliver Wooding

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# Programme

<b>1.00 – 1.20pm</b>	<b>Registration and refreshments</b>
<b>1.20 – 1.25pm</b>	<b>Welcome from Chair</b> <b>Julian Burrows, Partner, Wolferstans</b>
<b>1.25 – 1.50pm</b>	<b>Cohabitees: An update</b> <b>Alex Troup KC, Barrister</b>
<b>1.50 – 2.00pm</b>	<b>Will Bank – reconnect with clients and manage your Will Bank data more effectively</b> <b>Jack Percival, EstateSearch</b>
<b>2.00 – 2.45pm</b>	<b>Predatory marriage – a hidden crime</b> <b>Daphne Franks, Predatory Marriage</b>
<b>2.45 – 2.55pm</b>	<b>Fall in love with your ATE Insurer and look forward to a non-predatory partnership that will never die</b> <b>Matthew Pascall, Head of Commercial Dispute Resolution, Temple Legal Proction</b> A quick guide to ATE delegated authority schemes with Temple
<b>2.55 – 3.15pm</b>	<b>Break – cream teas &amp; prosecco</b>
<b>3.15 – 3.25pm</b>	<b>Managing finances after the death of a loved one</b> <b>Vasilis A. Panteli (HONS); DipFa; Cert CII, Lead Wealth Planner, Succession Wealth</b>
<b>3.25 – 3.50pm</b>	<b>Oliver v Oliver [2024] EWHC 2289 (Ch): A case update</b> <b>Joss Knight, Barrister</b> Joss acted for the successful claimant in which the last will of the claimant's late father was declared invalid. The claim is a rare example of a will being overturned on the grounds of both undue influence and a lack of testamentary capacity. Joss will provide a case update.
<b>3.50 – 4.15pm</b>	<b>Compromise, ADR, and settlement – pitfalls and solutions</b> <b>Oliver Wooding, Barrister</b> A little bit of something is better than a lot of nothing – Oliver will talk about the increased push for ADR, and common points that come up when trying to settle probate disputes.
<b>4.15 – 4.55pm</b>	<b>Interactive Session</b> <b>Daniel Soar, Jack Pankhurst, Barristers</b> Jack and Daniel will facilitate an interactive session drawing together the different themes from throughout the day.
<b>4.55–5.00pm</b>	<b>Close for questions – followed by networking drinks</b>

# Barristers

“

**Excellent chancery and probate team stands out on the Western Circuit, with members offering a wide range of expertise..**

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**The Legal 500, 2024**



**Alex Troup KC**

Year of call: 1998

**“Alex is a top-rated barrister and mediator, and his combination of skill, expertise and excellent bedside manner is evidenced time and again on every instruction. He can command a room whilst simultaneously remaining professional and sensitive to a client’s position. The quality of his work is always impeccable.”** The Legal 500, 2024

Alex is ranked as the only ‘star individual’ on the Western Circuit in chancery matters by Chambers UK and is Head of our Wills & Trusts team. He is also the only silk ranked in private wealth outside of London in the High Net Worth Guide 2024. Alex’s practice includes both advisory and contentious work relating to trusts, wills and the administration of estates, including claims based on proprietary estoppel and under the Inheritance (Provision for Family and Dependents) Act 1975.



**Oliver Wooding**

Year of call: 2009

**“Oliver is superb, very focused, technically sound and detail-orientated. ‘He has a broad practice and always provides us with practical, no-nonsense advice. He is a strong advocate in court’ ‘He is great; very personable and approachable and so solution-orientated.’ ‘He is extremely brainy, very modest and good with clients.”** Chambers UK, 2024

Oliver’s wills and trusts practice spans all contentious and non-contentious matters. He advises upon and acts, both as advocate and mediator, in disputes involving the validity of wills, claims under Inheritance (Provision for Family and Dependents) Act 1975, the removal of executors, construction of wills and trust documents, and for rectification of wills and trust documents. His expertise includes: administration of Estates, Disputed Wills, inheritance Act Claims, Proprietary Estoppel, Trusts, Mediation.

# Barristers



**Joss Knight**

Year of call: 2014

**“Joss is very tenacious. ‘He is very calm and reliable and gives sound, sensible and commercially minded advice. He provides advice well beyond his year of call in terms of his experience.’ ‘Joss is easy to work with, he is good with clients and his advocacy is nimble.’ ”** Chambers UK, 2024

Joss acts in a wide variety of wills, probate and estates matters and is ranked . He has particular expertise will validity disputes, Inheritance Act claims and claims for an interest in property on the basis of proprietary estoppel, resulting trust or constructive trust. Joss advises on all matters relating to the estate administration and has particular experience in claims with a professional negligence angle, and applications for the removal of executors under s.50 of the Administration of Justice Act 1985,. He regularly lectures on the topic and was recently successful in obtaining the removal of the professional trustees and executors of a seven-figure will trust on the basis they had acted capriciously in the exercise of their discretion and had incurred excessive costs.



**Daniel Soar**

Year of call: 2016

**“Dan is exceptionally user friendly and he has a knack for providing commercial and practical advice, delivered in an understandable manner. He is technically strong and will find solutions, even in complex circumstances.”** The Legal 500, 2024

Daniel has a broad wills and trusts practice encompassing both contentious and non-contentious work. He has experience advising on the proper construction of wills, their formal and substantive validity, will challenges based on lack of capacity, want of knowledge and approval, and undue influence. Daniel also frequently advises in relation to claims for provision pursuant to the 1975 Act.



**Jack Pankhurst**

Year of call: 2021

Jack’s practice encompasses a wide range of wills and trusts work. He is instructed on both contentious and non-contentious matters. His recent caseload includes the construction of wills, validity challenges, claims for CPR 64 directions, apparent stalemates between executors and beneficiaries, executors’ costs protection, the removal of personal representatives, and claims under the 1975 Act. Jack is also a commercial practitioner with a particular interest in offshore disputes, partnership, contractual and company law matters. He is experienced in acting in cases which relate in some way to agricultural or rural affairs. Jack welcomes invitations for in-house training and seminars relating to his areas of practice. He is a qualified mediator.

# Speakers



**Daphne Franks**

Predatory Marriages

Daphne taught Communication Skills plus other non-clinical topics at Leeds Medical School for many years and still works nationally as a freelance Communication Skills teacher. Daphne was unable to prevent her mother, Joan Blass, from suffering a predatory marriage in 2015, even though Daphne and her husband Stephen lived next door to her and had raised their fears about the man with the Police, Social Services, NHS and a solicitor. At the time of the marriage Joan was almost 92 with advanced vascular dementia and terminal cancer.

Daphne has been campaigning ever since to change the laws and procedures around marriage to prevent such marriages happening to others and has found huge overlap with other kind of abuse of the elderly such as grooming, gaslighting and coercive control. She has given over two hundred talks about the issues nationally and the campaign has made significant progress. More information may be found at [www.predatorymarriage.uk](http://www.predatorymarriage.uk) or by Googling Joan Blass, Daphne Franks or Predatory Marriage.

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# Sponsors



**Vasilis A. Panteli (HONs);  
DipFa; Cert CII**

Lead Wealth Planner  
Succession Wealth

Vas has considerable experience in wealth planning and wealth management, having provided high quality financial advice for over 20 years. He is a true advocate of holistic financial planning and prides himself on building long lasting, genuine relationships through providing a meaningful, personalised service. Vas will always seek to truly understand his clients' personal and financial circumstances, alongside their future goals and aspirations, throughout all stages of their lives, to allow his clients and their families to fully enjoy their desired lifestyle, without the fear of running out of money.

On a personal note, Vas is married with three young sons and enjoys spending as much of his free time as possible with his family, mainly encouraging their love of playing rugby. This generally doesn't leave much time for anything else, apart from watching his beloved Exeter Chiefs!



**Matthew Pascall**

Temple Legal Protection

Matthew was called to the Bar in 1984 and joined Guildford Chambers two years later. Spending more than 30 years in practice there, he was listed as a Legal 500 Tier One barrister. He joined the commercial team at Temple Legal Protection as Senior Underwriting Manager in 2017. Matthew was appointed to Temple's Board in December 2022 as Legal Director and Head of Commercial. His knowledge of the commercial legal sector and litigation practice is invaluable to the business and our clients, providing specialist experience to lead the commercial litigation insurance team.



**Jack Percival**

EstateSearch

Jack has been working with legal professionals for the last 14 years, with his career starting in the world of conveyancing technology. Jack joined EstateSearch over 2 years ago and has been working with Law Firms across the South of England to help streamline their processes and manage the increasing compliance risks associated with Bereavement & Mental Capacity cases.