

Bournemouth & District Lawyer



**Joanne Clarke,
BDLS President,
with Clive and
Raphaella Coleman**

INCLUDED IN THIS ISSUE:
BDLS Annual Dinner
The Law Society Bicentenary Drinks Reception
BDLS Lecture Programme





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BOURNEMOUTH & DISTRICT LAWYER

Bournemouth & District Law Society Magazine

Members will receive our 'Bournemouth Lawyer' by email, including the flyers for events, webinars and lectures.

Our Magazines are sent out quarterly as follows:

EDITION	MONTH	COPY DEADLINE
Autumn	September 2025	30th July 2025
Winter	December 2025	
Spring	March 2026	
Summer	June 2026	

The copy deadline for receipt at the BDLS office for the next edition – the Spring issue – will be **30th July 2025**.

We welcome your firms' news and any advertisements. Please send to office@bournemouthlaw.com.



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COVER INFORMATION

Joanne Clarke, BDLS President, with Clive and Raphaella Coleman

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BDLS DIARY 2025/2026

Mon 16 June	BDLS Annual General Meeting at Captains Club Hotel, Christchurch
Thurs 10 July	The Law Society Bicentenary Drinks Reception at Marsham Court Hotel, Bournemouth
Thurs 23 Oct	BDLS Wine Tasting Evening at Marsham Court Hotel, Bournemouth SAVE THE DATE
Wed 4 Feb 2026	BDLS Annual Lunch at The Pavilion Ballroom, Westover Road, Bournemouth SAVE THE DATE

The President's Column

Joanne Clarke



As I write this final report as President of the Bournemouth & District Law Society, I am filled with immense pride and gratitude for the opportunity to have served our legal community over the past year. It has been a privilege to represent such a vibrant, resilient, and engaging group of professionals.

One of the highlights of our calendar – and a personal highlight of my term – was the recent BDLS Annual Dinner. Held in the heart of Bournemouth, the event brought together practitioners from across the district to celebrate our shared profession, renew friendships, and welcome new faces to our ever-growing community. The evening was filled with laughter, thoughtful conversation and a strong sense of unity that reminds us all of the value of local legal societies like ours. I would like to extend my sincere thanks to all who attended, to our generous sponsors, and especially to Mandy Heath who worked tirelessly behind the scenes to make the evening a success. Your support and participation are what keep the Society thriving.

This year has not been without its challenges. The legal profession continues to navigate change at a rapid pace, whether through evolving legislation, technological advancements, or shifting expectations from clients and courts alike. Yet, time and again, our members have shown the adaptability and professionalism that make this community so remarkable.

Over the past twelve months, the Society has remained committed to supporting our members—through events, training opportunities and representations both at local

and national level. I am particularly proud of our work in promoting wellbeing and fostering a culture of inclusion within the profession.

As I prepare to hand over the role to my successor, Mark Proctor, I do so with confidence in the continued strength and relevance of BDLS. The incoming President will, I am sure, bring fresh ideas and renewed energy to the role, and I look forward to watching the Society continue to grow under his leadership.

Thank you to all the committee members, officers, and fellow practitioners who have supported me throughout the year. It has been an honour to serve you and I look forward to remaining an active member of this wonderful Society in the years to come.

Wishing you all a restful and sunny summer.

Warmest regards ■

Joanne Clarke
BDLS President

BDLS Theatre Group Trip To Hamilton

Mayflower Theatre, Southampton - Thursday 25 March 2025

On the evening of Wednesday 20 March, a group of members of Bournemouth & District Law Society swapped case files for spotlights as we headed to the Mayflower Theatre in Southampton to see the award-winning musical *Hamilton*. The outing proved to be a fantastic mix of culture, camaraderie and catchy tunes.

After arriving in good spirits, we gathered in the foyer to grab a drink, chat about the evening ahead and admire the buzzing atmosphere. Many of us had heard the hype surrounding *Hamilton*, but seeing it live was something else entirely. From the moment the lights dimmed and the first beat dropped, we were hooked. The story of Alexander Hamilton, with its fusion of musical styles and brilliant lyrics, had everyone completely absorbed. The cast delivered a high-energy, polished performance that brought history to life in a way that was both moving and incredibly entertaining.

After the final bows, there was plenty of excited chatter as we made our way back home. Whether it was a first-time experience or a long-anticipated night out, *Hamilton* left a

strong impression on us all. We're already looking forward to the next theatre night! If anyone has any suggestions for future trips, please email Mandy Heath at the BDLS Office mandy@bournemouthlaw.com ■

MARK KITELEY
Theatre Group Organiser



L:R top row: Mark and Helen Lello, Deanne Edwards, Alex Helliker and Mark Proctor
L:R bottom row: Marion Rose, Joanne Clarke, Eloise Butterworth, Anna Curtis, Mandy Heath and Marianna Lo Conte



L:R top row: Mark Proctor, Neil White, Julie and Gary Pick, Sian and Nigel Smith
L:R bottom row: Katie Belle, Sue and Mark Kiteley, Paula Rose

BDLS Pub Walk

Rufus Stone, New Forest - Sunday 13 April 2025

What better way to spend a Spring Sunday than a gentle stroll in the New Forest with colleagues, family and furry friends! The route took BDLS members through woodland trails to the historic Rufus Stone before making their way to the charming Sir Walter Tyrrell pub for some well-deserved food and refreshment.

Of course, no countryside walk is complete without some unexpected adventure and this one didn't disappoint! Two of our walkers had a particularly immersive experience when they found themselves well and truly stuck in the mud! Mentioning no names Ruth Elkins! True to form, our group rallied together and both were rescued with their spirits and dignity intact! Just another reminder that legal professionals really can handle any sticky situation!

Thank you to everyone who came along and made it such a great day. We can't wait to do it all again. Watch this space for our Summer walk! ■

EDWARD HOLMES

BDLS Past President and Pub Walk Organiser



Mark Proctor singing in the rain!



Mark Hamilton Cole



L:R Sue and Mark Kiteley, Florence and Conor Maher, Louise and Edward Holmes, Emma and Mark Hamilton Cole, Sian and Nigel Smith, Adrian Harding, Mandy and Julian Heath, Andrew Higgs, Ruth Elkins, Connor Todd-White, Mark Proctor and Neil White .. together with furry friends, Hugo, Gus, Charlie, Teddy and Totzi

BDLS Pub Walk

Rufus Stone, New Forest - Sunday 13 April 2025



Edward Holmes, Nigel Smith and Mark Kiteley



The walkers at Rufus Stone



Ruth Elkins still smiling after her muddy experience!



Rufus Stone, New Forest



The group enjoying a well-earned lunch at Sir Walter Tyrrell

BDLS Annual Dinner

Highcliff Marriott Hotel, Bournemouth - Friday 25 April 2025

BDLS hosted its prestigious Annual Dinner on 25 April at the elegant Highcliff Marriott Hotel on the West Cliff in Bournemouth, bringing together 215 guests from across the legal profession. The event was a remarkable evening of fine dining and networking, highlighted by the presence of esteemed guest speaker, Clive Coleman.

Society President, Joanne Clarke, welcomed the top table guests and our sponsors, thanking them for their continued support.

The highlight of the evening was undoubtedly the speech delivered by barrister, Clive Coleman, a much respected legal commentator and former BBC legal affairs correspondent who has also written comedy for film (including 'The Duke' starring Helen Mirren and Jim Broadbent) and television (including

'Chambers' starring John Bird and Sarah Lancashire), and theatre (including 'Young Marx' directed by Sir Nicholas Hytner). With his trademark wit, Clive shared stories from his days at the Bar, and his encounters with a raft of extraordinary clients, judges and opponents. He also gave an insight into the terrifying world of live broadcasting, concluding that messing up in court didn't even come close to messing up in front of 5 million television viewers!

Bournemouth & District Law Society's Annual Dinner once again proved to be an unmissable event, fostering both professional connections and a shared passion for the law. ■

MANDY HEATH
BDLS Office Manager

A huge thank you to College Chambers, Review Solicitors, PKF Francis Clark, On Point Data, Paragon and Groundsure for their kind sponsorship.

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LOCATION INTELLIGENCE

 PKF
FRANCIS CLARK
Shared Ambition



Nick Treble (Groundsure), Mandy Heath, Emma Hamilton Cole, Suzanne Kadziola, Carole Chedgy

BDLS Annual Dinner

Highcliff Marriott Hotel, Bournemouth - Friday 25 April 2025



Sarah King and Ashley Hinwood (PKF Francis Clark)



Margaret Baker and Katharine Jones



Jeremy Channon and Sam Freeman



Jamie Blinko and Sophie Pascoe



Kelvin Mugariri, Amy Oke, Harrison Willis, Amy Lindley and Luke Foot (College Chambers)



Sam Linford, Florence and Conor Maher and HHJ William Mousley

BDLS Annual Dinner

Highcliff Marriott Hotel, Bournemouth - Friday 25 April 2025



Peter Watson-Lee and Mark Proctor



Benjamin Parr, Charlie Gill and Paul Hanney (Review Solicitors)



Alan and Mo Aldridge with Linda and Owen Thomas



BDLS Presidents: Michael Newbold, Peter Watson-Lee, Fiona Knight, Jo Clarke, Edward Holmes, Emma Hamilton Cole, Neil White and Mark Kiteley



Kerry Houston-Kypta and Marie Harder



L:R Ruth Lucas, Justine Chapman, Brandon Gillard-Bunting, Richard Brixey, Amy Edgson, Florence Morrow, Hugo Haub, Mark Hensleigh, Jodie Lillington, Kelly Payne and Mark Lello

BDLS Annual Dinner

Highcliff Marriott Hotel, Bournemouth - Friday 25 April 2025



Kirsty Jocham, Coco Beverley, Jean Cross, Luke English, Ellie Emery, Zoe James, Becci Newton and Natasha Boyland



Eloise Butterworth and Amy Cousineau Massey



Marc Del-Llano and Katie Owen



Bethan Morris, Savannah Mayes, Leah Sharman, Maria Evans and Emma Bowditch



Georgie Standhaft and Paige Abbott



Marc Del Llano, Nicola Bennetts, Richard Hall, Chris Reeves, Clare Eastwood, Tom Filleul, Mark Proctor, Kirsty Oak, Kelvin Mugariri, Louise Burn and Owen Baker

BDLS AGM AND LECTURE:

Monday 16 June 2025 Captains Club Hotel, Christchurch

BDLS AGM AND LECTURE: NAVIGATING AND SUPPORTING MENTAL HEALTH IN YOUR FIRM

Cost: FREE OF CHARGE. PLEASE NOTE THAT THIS PRESENTATION IS AVAILABLE TO MEMBERS OF THIS SOCIETY ONLY

Join us for the Bournemouth and District Law Society's Annual General Meeting at the prestigious Captains Club Hotel. This is an excellent opportunity to connect with fellow legal professionals, discuss the year's achievements and hear about plan for the year ahead. Timings are:

16:30 Registration – tea/coffee/biscuits

LawCare

17:00 NAVIGATING AND SUPPORTING MENTAL HEALTH IN YOUR FIRM

Elizabeth Rimmer, CEO, LawCare

- Steps that firms can take to support the mental health of their staff
- The importance of good people management and supervision
- Meeting the challenges of the regulatory environment
- An overview of LawCare's work

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17:45 SUPPORTING THE PROFESSION IN 2025

Nick Gallagher, CEO, The Solicitors' Charity

18:00 ANNUAL GENERAL MEETING

A short AGM to find out what is happening locally. AGM papers will be emailed to members separately.

18:15 Drinks reception – Canapés with wine/soft drinks

Please book online at <https://www.bournemouthlaw.com/bournemouth-district-law-society-lectures>

The AGM papers have been emailed to members.

If you haven't received them, please contact Mandy Heath at the BDLS Office mandy@bournemouthlaw.com

BDLS CRICKET TEAM FIXTURES 2025



BDLS cricket team plays in the Bournemouth Evening league. It is 20:20 cricket and a perfect way to spend a few summer evenings with other local members. The team has been running for decades and hopefully it will continue to do so for many more years to come.

We are pleased to confirm the fixtures with the games commencing at 18:30. They would really appreciate support so please just turn up on the day to cheer them on! Please note, however, that all fixtures are subject to change from time to time.

If you are interested in finding out more about the BDLS Lex cricket team, please contact Sam Freeman
s.freeman@laceysolicitors.co.uk ■

DATE	OPPOSITION	VENUE
27 May	JP Morgan	Hurn
3 June	Lloyds	Hurn
17 June	Portchester	Hurn
26 June	Portchester (cup match)	Hurn
1 July	College	Kings Park
15 July	New Forest Physios	Winton
29 July	Dorset Police	Hurn

THE LAW SOCIETY OF ENGLAND AND WALES BICENTENARY NETWORKING DRINKS RECEPTION

Thursday 10 July 2025 17:00 – 19:00 Marsham Court Hotel, Bournemouth



This networking event will provide the opportunity to hear directly from the Vice President of the Law Society of England and Wales, Mark Evans, who will provide opening remarks on the Law Society's ongoing work to represent, promote and support members.

Throughout the evening, the Law Society would like to hear from you about your key priorities and those issues impacting you and your practice, to understand how the Law Society can best develop, adapt and innovate to best support your interests and needs.

Complimentary refreshments will be provided and there will be ample time to connect with your peers in a relaxed, informal setting.

Date: Thursday 10 July 2025

Time: 17:00 – 19:00 (arrival from 16:45)

Details: In-person

Venue: Marsham Court Hotel, 3 Russell Cotes Road, Bournemouth BH1 3AB

RSVP: Via this MS Form: forms.office.com/e/GkGYVGAgXK

As this is an in-person event only, spaces are limited and you are encouraged to **RSVP early** to avoid disappointment.

This networking event will immediately follow Bournemouth & District Law Society's **annual Compliance Conference** for which the final few places are available. Find out more about the conference programme and **book here**.

BDLS AN AUTUMN EVENING OF WINE TASTING

Thursday 23 October 2025 17:45 to 20:30 Marsham Court Hotel, Bournemouth



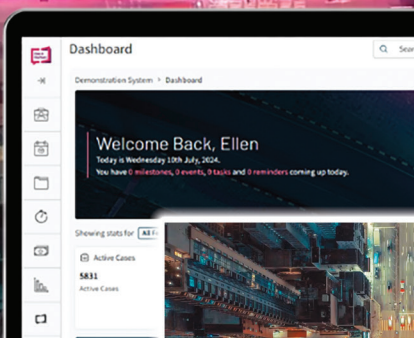
Join colleagues, friends and fellow member of BDLS for a relaxed and informative evening when expert sommelier, Gemma Withenshaw, of VinGin will expertly guide us through a variety of exquisite wines. For the fantastic price of £25, the evening will include a tasting of six wines, including champagne, and a cheeseboard.

Wine lovers of all levels welcome! Join us for an evening filled with good wine and great company.

Full details will be emailed to members shortly. Watch this space!

Kindly sponsored by:





L-R Gayle Clarke, Head of Marketing, Practice Management, Tim Kidd, Chief Executive of The ILFM, Catrin Macleod, Head of Product, Practice Management

UK Practice Management Solution Recognised at the 2024 ILFM Law Firm Software Users Awards

- Dye & Durham's practice management solutions operate under the Insight Legal and Quill brands in the UK
- Insight Legal, a Dye & Durham solution, has been recognised for the eighth year
- The ILFM Law Firm Software Users Award is voted on by legal professionals who rely on practice management and legal accounting solutions daily.

Dye & Durham is proud to announce that Insight Legal, one of its practice management solutions, has been awarded Silver at the 2024 Institute of Legal Finance & Management (ILFM) Law Firm Software Users Awards. This marks the eighth year that Insight Legal has been recognised by legal professionals for its contributions to legal practice management and accounting.

The ILFM is the UK's leading membership organisation for legal finance and practice management professionals. Its annual software awards are based on direct feedback from legal cashiers, practice managers, COFAs, and senior partners who use legal software daily. Their insights reflect the real-world impact of practice management solutions in driving efficiency and compliance within law firms.

"We're honoured that our practice management solutions continue to receive recognition from the legal community, particularly as this award was voted for by Insight Legal's user base" said Catrin Macleod, Head of Product, Practice Management at Dye & Durham. "This award reflects and reinforces our commitment

to providing innovative, reliable technology that law firms can depend on. As part of Dye & Durham, Insight Legal users benefit from an even broader suite of tools designed to support every aspect of legal practice."

As a global leader in legal technology, Dye & Durham continues to invest in enhancing its suite of practice management solutions, ensuring law firms across the UK have the tools they need to succeed in an evolving legal landscape.

About Dye & Durham Limited

Dye & Durham Limited provides premier practice management solutions empowering legal professionals every day, delivers vital data insights to support critical corporate transactions and enables the essential payments infrastructure trusted by government and financial institutions. The company has operations in Canada, the United Kingdom, Ireland, Australia and South Africa. Additional information can be found at www.dyedurham.com. ■



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The Law Society

The screenshot displays the Unity Practice Management software interface. On the left is a sidebar menu with options like 'Filter Navigation', 'Clients & Cases', 'Organiser', 'Documents', 'Time', 'Money', 'Reports', and 'Conveyancing Solutions'. The main dashboard area is titled 'Dashboard' and includes a search bar. A large banner welcomes 'Ellen' back, stating 'Today is Wednesday 10th July, 2024' and 'You have 0 milestones, 0 events, 0 tasks and 0 reminders coming up today.' Below this, there are several key performance indicators (KPIs) for 'All Fee Earners':

- Active Cases:** 5831
- Unbilled Time:** 953h 56m
- Compliance:** 30 Client Breaches, 43 Office Breaches
- Debtors:** £654,326.44 Unpaid Bills, £64,429.41 Unbilled Disbs

There is also a 'Recent Cases' section listing 'Purchase - 7 Elm Grove, Rhyl' and 'TEST MATTER STONE Roys Mr (Search-Update)'. At the bottom right, a 'Sales Actual Vs Budget' chart shows a significant gap between the budget and actual performance.



BOURNEMOUTH & DISTRICT
JUNIOR LAWYERS DIVISION



Bournemouth & District Junior Lawyers Division

It's hard to believe we're already into the summer stretch of the BDJLD year, and what a year it's been so far! As ever, our calendar has been packed, our members have shown up in force, and our committee has been hard at work putting together a programme of events that brings together the junior legal community of Bournemouth and beyond.

Event Highlights

Spring saw the inaugural BDJLD Darts Championship, which proved to be an unexpected hit – quite literally – and showcased some serious (and some not-so-serious) darting talent. Huge congratulations to Tom Baker, who emerged victorious and now holds the very first BDJLD Darts Championship trophy!

We were also delighted to collaborate with CISI for a buzzing speed-networking evening at Koh Thai. It was brilliant to see so many professionals across sectors making valuable new connections across industries.

Looking Ahead

We're especially excited about two major events on the horizon. First up is the much-anticipated return of **Day at the Races at Salisbury Racecourse**, generously sponsored by **3PB Chambers** – we're incredibly grateful for their support. It promises to be a memorable day filled with sunshine, socialising and a little flutter for the brave.

And of course, the **BDJLD Summer Ball** is back on **Friday 1 August 2025**, set to take place at the elegant **Carlton Hotel in Bournemouth**. Always a highlight of the social calendar, this event brings our community together.

Membership

We're thrilled to share that we now have over 200 members and counting – a milestone that reflects the enthusiasm and engagement of junior legal professionals and their firms across the region.

If your firm hasn't signed up all eligible staff yet, now's the time! Membership gives access to discounted rates on events, exclusive members-only socials, and development opportunities that make it well worth the small cost – in fact, many members find their membership pays for itself within just a couple of events.

Encouraging full-firm sign-ups helps ensure no one misses out, and we're always happy to talk to firm representatives about how to make this as simple as possible.

As we head into summer, the BDJLD remains committed to providing top-tier events, professional development opportunities, and a supportive community for our members. Whether you're new to the area or a long-standing member, we can't wait to welcome you at our upcoming events. ■

Matt Rushent

President for the BDJLD

<https://www.bdjld.co.uk/>



Tomas Baker – Inaugural Winner of the BDJLD Darts Championship



BDJLD and CISI Speed-Networking

Who Owns and Controls Your Law Firm's Data?



Law firms increasingly rely on technology to streamline their operations in the modern digital age. Legal software solutions have become indispensable, from case management to billing and time tracking. However, a fundamental question often needs to be addressed: **who owns the data entered into these systems, and how easily can it be moved elsewhere?**

Understanding the Data Ownership

Data ownership refers to legal rights and control over digital datasets. For law firms, this includes client information, case notes, billing records, and confidential strategies. Clear data ownership is essential due to ethical obligations. However, third-party legal software can complicate this, risking data loss, breaches, or legal disputes. Transparent contracts defining data ownership are crucial to protect the firm's interests and client confidentiality.

Significance of Data Portability

Data portability—seamlessly transferring data from one system to another—intersects with data ownership. For law firms, data portability holds immense value due to various reasons:

- **Flexibility:** As law firms evolve or their needs change, switching to a more suitable software solution should be effortless, and data portability ensures just that.
- **Security and Backups:** Exporting data empowers firms to create independent backups, enhancing data security and protecting against potential loss or breaches.
- **Regulatory Compliance:** In certain jurisdictions, individuals can access or transfer personal data between service providers. Law firms must ensure their software providers facilitate compliance with such regulations.

Bigger Picture: Asking the Right Questions

When engaging software providers in discussions about data management, law firms must scrutinise responses diligently. Law firms can effectively safeguard their interests and client confidentiality by understanding the subtleties within the provider's answers. Here are the key queries to pose regarding data ownership and portability:

- **Ownership of Data:** Providers must acknowledge that the law firm retains ownership of all data entered.
- **Data Retrieval Upon Termination:** Ensure contracts guarantee a simple and complete data retrieval process post-termination. Data Export Options: Seek responses offering standard, open-format data export options for system compatibility.
- **Export Costs:** Watch for high fees or complex pricing hindering data portability rights.
- **Data Transfer Security:** Providers should show data protection measures, encryption, and secure transfer protocols.

Take control of your law firm's data with Clio, the #1 choice for honest, transparent legal tech. Book a personalised product walkthrough with our Clio experts and see how Clio can improve your data management. Visit [Clio.com/uk](https://clio.com/uk) to learn more. ■

BDLS Lecture Programme 2025

KEY:

LIVE WEBINARS

FACE TO FACE LECTURES



Kindly sponsored by



DATE AND TIME	LECTURE	FORMAT	LECTURER	VENUE
16 June 2025 17:00 – 19:00	BDLS Annual General Meeting BOOKINGS OPEN TO MEMBERS OF BDLS	Face to Face		Captains Club Hotel
19 June 2025 11:00 – 12:00	In a Nutshell – the Latest in Leasehold Reform and Commonhold for Conveyancers	Live Webinar	Matt Lewis	Zoom
25 June 2025 10:00 – 16:30	Family Law Conference	Face to Face	Various	Marsham Court Hotel
1 July 2025 12:00 – 12:30	What Do Conveyancers Need To Know About The New Law Society Climate Change Practice Note?	Live Webinar	Nick Treble	Zoom
2 July 2025 14:00 – 17:15	Reviewing Wills and Trusts in the light of the IHT changes in the 30 Oct Budget	Face to Face	John Bunker	Marsham Court Hotel
10 July 2025 09:15 – 16:45	Compliance Conference (followed by The Law Society Bicentenary Drinks Reception)	Face to Face	Various	Marsham Court Hotel
15 July 2025 13:30 – 16:45	Conveyancing Hot Issues	Face to Face	Richard Snape	Marsham Court Hotel
4 September 2025 11:00 – 12:30	Deliberate Deprivation for Social Care	Live Webinar	Caroline Bielanska	Zoom
25 September 2025 12:00 – 13:00	AI in Business: Risk, Opportunities and Impact	Live Webinar	Luke Williams	Zoom
2 October 2025 11:00 – 12:00	Topic to be confirmed	Live Webinar	Richard Snape	Zoom
8 October 2025 TBC	Private Client Conference	Face to Face	Various	Marsham Court Hotel
15 October 2025 09:00 – 16:00	Emergency First Aid at Work Certificate (Level 3)	Face to Face	Green Cross Global	Queens Hotel
22 October 2025 09:15 – 12:15	Emergency remedies: ICOs, EPOs, and PPOs	Face to Face	Safda Mahmood	Marsham Court Hotel
22 October 2025 13:15 – 16:15	Advocacy Training in Family Law	Face to Face	Safda Mahmood	Marsham Court Hotel
26 November 2025 Times to be confirmed	Property Conference	Face to Face	Various	Marsham Court Hotel

BDLS Lecture Programme 2025 (cont.)

All lectures are to be booked online. For further details please visit Bournemouth and District Law Society Website.

www.bournemouthlaw.com/lectures or scan here: ■



Course Notes

For environmental reasons, BDLS will no longer be providing printed course notes at lectures. Lecture notes will be emailed to delegates in advance for either printing or accessing via their laptop or alternative device on the day.

Payment for lectures

Please note: Payment must be received at the office before the lecture takes place. All payments are to be paid by BACS. Course bookings will only be confirmed upon payment. Webinars are charged per person and not for group bookings.

Cancellation Policy

No refunds will be given for any booking cancelled within two days of the lecture/webinar taking place.

We strive to offer our members a range of lectures not just covering competency "B" – Technical Legal Practice but also to meet the wider competencies which all solicitors need to state annually they are meeting. The 4 competencies are:

A – Ethics, Professionalism and Judgement

B – Technical Legal Practice

C – Working with other people

D – Managing yourself and your own work

For further information:

<https://www.sra.org.uk/solicitors/resources/continuing-competence/cpd/competence-statement/>. ■

Summary of Upcoming Live Time Lectures and Webinars

WEBINAR Thursday 19 June 2025 – 11:00 – 12:00

Topic	IN A NUTSHELL – THE LATEST IN LEASEHOLD REFORM AND COMMONHOLD FOR CONVEYANCERS
Lecturer	Matt Lewis
Cost	£35 – Solicitor Member; Associate Member; Trainees (Solicitors; Cilex; Apprentices) and £55 Non Member of BDLS

■ Following the introduction of the Leasehold and Freehold Reform Act 2024, and the confirmation of a draft Leasehold and Commonhold Reform Bill on its way, this session will look at the headlines relevant to property lawyers, with a specific emphasis on residential conveyancing.

Whilst most provisions are not yet in force, there are some considerations which lawyers ought to be thinking about now.

As well as exploring the headlines and identifying the parts of the 2024 Act that have been introduced, in this short session Matt will look at the top tips for residential conveyancing lawyers now.

Summary of Upcoming Live Time Lectures and Webinars

LECTURE Wednesday 25 June 2025 – 09:30 – 16:15

Topic	FAMILY LAW CONFERENCE
Lecturer	Various
Venue	Marsham Court Hotel, Bournemouth
Cost	£110 – Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices) £150 – Non Member of BDLS

SPEAKERS AND TOPICS

SPECIAL GUARDIANSHIP ORDERS, SECTION 37 CHILDREN ACT 1989 AND COSTS

Marianna Lo Conte and Andrew Skinner, College Chambers

ENSURING TOXICOLOGY TESTING SUPPORTS JUSTICE FOR ALL FAMILIES REGARDLESS OF THEIR RACE, ENVIRONMENT OR PRIOR DRUG

Ryan Mason, DNA Legal

LEGAL UPDATE – CHILDREN

HHJ Christopher Simmonds

MODERN TRENDS IN ONLINE COMMUNICATION FOR SEPARATING FAMILIES

Alicia Farran, OurFamilyWizard

TOLATA

Hamish Dunlop, 3PB

SECTION 1 APPLICATIONS

Mark Elliott, 3PB

RECENT FRC CASES

DJ John Bridger

Please click here for full details: <https://www.bournemouthlaw.com/res/Family%20Law%20Conference%20flyer%2025.6.25.pdf>

WEBINAR Tuesday 1 July 2025 – 12:00 – 12:30

Topic	WHAT DO CONVEYANCERS NEED TO KNOW ABOUT THE NEW LAW SOCIETY CLIMATE CHANGE PRACTICE NOTE?
Lecturer	Nick Treble, Groundsure
Cost	FREE TO ATTEND – Member; Associate Member; Trainees (Solicitors; Cilex; Apprentices) and Non Member of BDLS

■ In this session we will take a closer look at the latest Practice Note which will be published by the Law Society on the 12th May. Strategic Account Manager at Groundsure, Nick Treble, will summarise the updates and explain what they mean for conveyancers.

Nick will provide:

- A summary of the practice note
- The definition of climate change risks
- The Climate Index module, climate change data, and available reports
- The climate change tool kit and support that is available to you and your clients
- Practical guidance and next steps

Summary of Upcoming Live Time Lectures and Webinars

LECTURE Wednesday 2 July 2025 – 14:00 – 17:15

Topic	REVIEWING WILLS AND TRUSTS IN THE LIGHT OF THE IHT CHANGES IN THE 30 OCT BUDGET
Lecturer	John Bunker
Venue	Marsham Court Hotel, Bournemouth
Cost	£95 – Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices) £145 – Non Member of BDLS

The huge changes to Inheritance Tax (IHT) in the Budget call for a re-thinking of provisions in wills, and variations of estates and trusts in Wills, to make full use of the reduced agricultural and business reliefs and prepare for the planned pensions changes. These will add considerably to the IHT burden of many and add to the potential loss of RNRB - which necessitates new thinking. New issues also arise for lifetime trusts for APR & BPR.

- What will planning would now help clients concerned about their exposure to increased IHT?
- What are the key elements of the main changes on pensions and APR/BPR relevant to wills and trusts?
- We will consider any updates on these major issues.
- How can trusts in wills help make effective use of the Nil-Rate Band and RNRB, to bank these sums and the maximum APR/BPR, and reduce the estate of a second spouse?
- What to do to use the RNRB for non-spouse couples.
- Options for leaving shares of property in trust, to avoid an unnecessary extra charge for IHT.

This Seminar complements the BDLS Webinar on Lifetime planning on 12 March, for those who attended that, but it can also stand alone for those who did not. The Spring Statement may in practice need to be a further “mini-budget” and we will consider any extra capital tax changes that are made.

LECTURE Thursday 10 July 2025 – 09:15 – 16:15

Topic	COMPLIANCE CONFERENCE
Lecturer	Various
Venue	Marsham Court Hotel, Bournemouth
Cost	£135 – Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices) £180 – Non Member of BDLS

SPEAKERS AND TOPICS

EQUALITY, DIVERSITY AND INCLUSION

David Green, Regulation and Compliance Office

AML - HAS IT GOT HARDER ALL OF A SUDDEN?

Amy Bell, Teal Compliance

200 YEARS OF LEGAL EXCELLENCE

Insights from Mark Evans, Vice President, The Law Society of England and Wales

UPDATE ON COMPLAINTS HANDLING AND OUR APPROACH TO FIRST TIER COMPLAINTS

Jason Chapman, Legal Ombudsman

DATA BREACHES, ICO, CYBER CRIME ARTIFICIAL INTELLIGENCE

David Green, Regulation and Compliance Office

EDUCATING AND TRAINING SOLICITORS AND THE FUTURE OF APPRENTICESHIPS AT BOURNEMOUTH UNIVERSITY

Jamie Fletcher, Bournemouth University

SRA ACCOUNT RULES – YOUR ANNUAL UPDATE

Janet Taylor FCA - Consultant, PKF Francis Clark

Please click here for full details:

<https://www.bournemouthlaw.com/res/Compliance%20Conference%20flyer%20-%2010%20July%202025.pdf>



By way of introduction, I am the Clinic Support & Development Officer (South West) at LawWorks. The Clinics Programme helps set up and maintain sustainable pro bono legal clinic partnerships between legal professionals, law schools and advice agencies to help address unmet legal need in the community.

I have spoken to Joshua Hevicon, Wellbeing Hub Manager at Access Wellbeing in Dorset and Bournemouth regarding the need for a Pro Bono Clinic in the area, he confirmed there is an urgent need for a new Pro Bono Clinic in the Dorset and Bournemouth area.

Access Wellbeing has launched three wellbeing hubs in Boscombe, Poole and in Weymouth, where you can drop-in and access support from trained wellbeing coordinators, and there are other hubs and community drop-in services across the county planned too.

Joshua shared that they have a variety of people, partners and organisations that visit the hubs, either to gather information, be signposted or referred to local and national organisations. There is a significant number whom need legal advice and support.

Access Wellbeing offers earlier access to different types of support depending on the need, mental health, financial matters, work, or concerns about housing or benefits. Early access to support can prevent concerns from escalating and empower people to support their future health and wellbeing.

Access Wellbeing aims to provide:

- The right support – person-centred mental health and wellbeing support that can be accessed by anyone aged 18 and over
- At the right time – access to advice and help when it's most needed, recognising what matters most to people at any point in time
- In the right way – a choice of ways to get help and support, including face to face and online

Access Wellbeing is a partnership between the NHS, councils, charities, and community groups working together to deliver support and help to people, when and where they need it - with a strong focus on people living the life that they wish to live, in their community.'

As you can see from the above a Pro Bono clinic or service to work in partnership with Access Wellbeing would be excellent addition and much needed resource for the communities across the area. There have been no firm decisions made yet about exactly how the clinic will operate, this is flexible depending on views of firms who are interested in being involved.

I am also in the process of developing a Pro Bono Committee for Devon, Cornwall and Dorset with Toby Brown from South Square. Please see <https://www.probonocommittee.uk/regional-committees/>

We would be delighted if your firm would like to be involved in this project, as we feel it would be a very useful service for the people of the area.

If you would like to discuss this matter further, I am available for a face-to-face meeting or via teams. ■

Richard Lynch

Clinic Support & Development Officer (South West)

Mobile 07961 785564

richard.lynch@lawworks.org.uk

LawWorks

www.lawworks.org.uk



PRACTICE MANAGERS/MANAGING PARTNERS/ HRMANAGERS/COLPS/COFAS – WHATSAPP FORUM

A platform for discussing best practices, share information and seek advice on issues specific to these roles.

If you would like to join this group, please email mandy@bournemouthlaw.com with your mobile number



BDLS Health in the summer...

As a professional worker with plenty of sedentary time indoors at the office, how can we use the summer months to promote our health?

1. Time outdoors

Sunlight is a natural way to boost our moods...see it as like a free anti-depressant or a proactive way to promote better mental and physical health. A morning walk before work? A lunchtime, post-meal stroll to help digest? And/or an evening walk to decompress after a stressful day. If you are working from home sometimes, do consider factoring in the 'fake commute'. Walking to work – even though that may be in your home office. You will generate some good energy from a morning walk, cycle or run.

2. BBQs...get them going

If we are using the BBQ when we get home, it is a chance to get even more time outdoors, relax in the evening sun, stand up whilst you're cooking and eat some fresh food with great flavour. BBQs can tick a few healthy boxes, especially if you're enjoying the company of friends or family. Think grilling meat, fish, veg kebabs or halloumi cheese. If you add a fresh, seasonal salad, with feta cheese, and some seeds on top, with a dressing of balsamic vinegar and extra virgin olive oil, happy days. No ultra-processed foods at all.

3. Ice cream...do your homework

Whilst we talking ultra-processed, let's talk ice cream. A vanilla ice cream could include sugar, cream, egg yolks, milk and vanilla extract. However, shop-bought varieties have countless ingredients that you may not recognise. So, if/when you do choose to buy a round for your work colleagues, I would suggest buy the best available and with the least ingredients.

4. Sun cream...again, do your homework!

One more cream to mention...sun cream! I have been curious about this for a few years and noticed that certain sun cream brands are better than others. As our skin is a massive organ and it absorbs everything it is beneficial to select the least toxic options. Time in the sun is essential for topping up Vitamin D and feeling good. Everyone's tolerance of the sun is different but, for short intervals, a quick dose of sun on your skin is a mood-booster and a simple way to decompress after a challenging time.

This is just the beginning! For even more support, you can download my FREE Positive Morning Routine guide to learn how to intentionally start your working day with positive energy. You can sign up at <https://www.ollyleicester.co.uk/>

My aim to help people stay well and thrive at work and be healthy by design. ■



Olly Leicester
Health Coach

LawCare

DON'T GO IT ALONE: Find Your Community

In the demanding and sometimes lonely legal sector, it's easy to feel like you're on your own. But you're not. Mental Health Awareness Week (held in May) highlighted the value of community - how it supports, connects, and helps us thrive.

Community is one of the best tools we have to protect and improve mental health. When we feel seen, heard, and understood, we're more likely to open up, ask for help, and offer support in return. In the legal sector – where intense pressure, high expectations, and long hours are common – building strong, supportive relationships provides the connection, perspective, and strength needed to manage these demands.

But community doesn't just happen. We build it through trust, honest communication, inclusion, and collaboration. It begins with a conversation, a coffee, or simply asking someone how they are.

Who do you turn to when it's tough?

Communities come in many shapes and sizes. You might find yours:

- In your **workplace**, when colleagues check in and look out for each other.
- At home with **family and friends**.
- Through **professional networks and forums**, where you can talk to others working in similar fields and share ideas.
- In **shared identity groups**, where you can connect with other people who've had similar experiences to you.
- **Online**, via virtual meetups, support groups, or chatting with others on social media.
- With **LawCare** - a welcoming, non-judgemental space offering confidential support, peer support, and resources specifically for the legal sector.

LawCare is more than a helpline

LawCare is a supportive community run by people who've worked in the legal sector and understand what it's really like.

If you're feeling stressed, burnt out, lonely, or just need someone to talk to, you can get in touch with LawCare. You'll speak to a trained volunteer (who has firsthand experience of the legal sector) who will listen without judging. You can get in touch Monday to Friday, 9am to 5pm, on 0800 279 6888 or use the online chat on the website: www.lawcare.org.uk

LawCare's peer support programme is another way you can find support. Again, you will be put in touch with someone who's worked in law and been through similar struggles.

Alongside one-to-one support, LawCare helps connect the legal community through webinars, practical training, insightful research, and events. We also share helpful resources and real stories on our website and in our LinkedIn newsletter, supported by our brilliant network of volunteers, Champions, and Trustees.

Keep building your community

Mental Health Awareness Week has passed, but maintaining a supportive community is a year-round effort. Here are small steps you can take:

1. Talk more - Talking to others helps, especially when work feels stressful. Grab a coffee with a colleague, check in with a client, or message someone you haven't spoken to in a while. Even picking up the phone instead of emailing can help you feel more connected.
2. Share your story. Writing about or speaking on your experiences can inspire others, challenge stigma, and build solidarity.
3. Support LawCare - At LawCare, we believe no one in law should have to struggle alone. Here's how you can help:
 - Raise money for LawCare by running, walking, hiking, or paddling with colleagues. Every pound helps us support more people in the legal community.
 - Donate to fund LawCare's confidential helpline, online chat, peer support training, webinars, and research – <https://lawcare.org.uk/donate>
 - Join LawCare's new 25 Club to get closer to our work and actively support the LawCare community – LawCare's 25 Club | LawCare

Being part of a community instils a deep-rooted sense of belonging and drives collective change by influencing culture, policy and organisations in ways that a single voice cannot. Mental health matters every day – let's keep the conversations going and the communities growing. ■

LawCare is the mental health charity for the legal sector

LawCare

LawCare offers free and confidential emotional support, peer support, and information to people working in law in the UK.



LawCare helpline; **0800 278 6888**



Online chat: **www.lawcare.org.uk**

You can also email **support@lawcare.org.uk**. The helpline is open Monday to Friday, 9am to 5pm. All calls and chats are answered by trained volunteers with direct experience of the legal sector.

Free, confidential, non-judgemental emotional support for anyone working in a legal environment. We provide a space for you to talk through whatever is on your mind. We can also signpost you to other support agencies. Please contact any of the following:



Mark Kiteley
mkiteley@rawlinsdavyreeves.com
Tel: 01202 558844



Nicola Lowe
Nicolalowe@hgwalker.co.uk
Tel: 01202 881454 or 07854 787358
(outside office hours)



Edward Holmes
egholmes@meesons-spurlings.co.uk
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BDLS MEMBERS' BENEFITS



Did you know as a member of BDLS, you can take advantage of the corporate rate with BH Live leisure centres? The monthly cost is £38, as opposed to the usual fee of £45. This includes use of the gym, swimming pool, spa and classes across all their sites in Bournemouth and Poole.

Please visit their website for full details <https://bhliveactive.org.uk/join>

If you would like to join, please email me at mandy@bournemouthlaw.com and I will provide you with an email to confirm your membership with BDLS.

We hope to soon be able to offer further membership benefits so watch this space!

Firms' News

New Partners at Preston Redman

The partners at Preston Redman are delighted to announce that Louise Boyle and Hugo Haub, both Associate Solicitors, became partners on 1 April.

Louise joined the firm in February 2022, having qualified as a solicitor in September 2009. Louise has extensive experience in Business Recovery and insolvency, dealing with contract and commercial disputes, Landlord and Tenant issues, contentious probate, Partnership arguments and construction and engineering claims. Louise has broad knowledge on enforcement and can advise on a variety of ways to recover Judgment debts.

Working with a wide range of clients including companies, partnerships and individuals, Louise strives to build a strong connection and relationship with clients to fully understand the issues in hand to achieve their desired objectives as quickly and efficiently as possible.

Hugo joined the firm in May 2016 shortly after finishing his degree. He qualified as a Solicitor in September 2019. Hugo deals with a broad range of contentious property matters and accepts instructions in other areas of civil litigation including construction, consumer law and disputes relating to goods and services.



Louise Boyle



Hugo Haub

Hugo has experience in both commercial and residential landlord and tenant disputes including forfeiture, residential possessions, debt recovery, service charge issues, contested business lease renewals, right to manage claims and covenant disputes. He is a member of the Property Litigation Association. ■



Preston Redman – get their hands dirty

As part of the Bournemouth Town Centre BID initiative, the Big Bournemouth Clean Up. Staff from Preston Redman, along with volunteers from other local businesses, Town Rangers and Bournemouth Town Centre BID staff took time out of their busy schedules to get their hands dirty and become involved in the clean-up. Donned with gloves, bin bags and litter pickers they focused on Bournemouth town centre, picking up litter as they went. An iron board of all items was found in the bushes!



Back row L-R Georgia Hems, Jshan Kumar, Charlotte Dawson, Mark Hensleigh, Matthew Trim, Philippa Rawlinson, Amy Cubitt and Brandon Gillard-Bunting. Front row L-R Kate McLaughlin, Elicia Gravett and Abby Johnson.



Firms' News

Mark Hensleigh Recognised At Ceremony For Reaching 100 Blood Donations

On 25 February 2025, Mark Hensleigh, Partner at Preston Redman solicitors attended a blood donation ceremony for those people who have given 100 donations of blood and others who have given 150 platelet donations. No one who does this seeks recognition. They all do it because they want to help people. Every donation will either save a life or improve someone's life.

At the ceremony a local mother, gave a talk about her 3 year old daughter who had leukaemia. Without blood and platelet donations her daughter would not have lived and she's now a happy 3 year old. Only 6% of the population give blood. It only takes 30 minutes to donate it's not painful and there are no side effects. Everybody who is able to give blood is encouraged to do so. ■



Mark Hensleigh

Tom Alder, elected as Lester Aldridge's new Managing Partner

Lester Aldridge is pleased to announce the appointment of Tom Alder as the new Managing Partner. Tom, the current Head of LA's Real Estate Development team, brings a wealth of knowledge and a strong vision for the firm's future.

Tom has been with Lester Aldridge since 2005, when he joined as a trainee. He has established a reputation as a strong leader and has been instrumental in delivering significant growth within the Real Estate Development team. He also played a key role in the successful LA Southampton office move to Mountbatten House, Grosvenor Square, in the summer of 2024.

"We are excited to welcome Tom Alder as our new Managing Partner," said Matthew Barrow, current Managing Partner. "He has consistently demonstrated exceptional dedication to the firm and our clients and has played a significant role in our firm's growth. His leadership will undoubtedly drive Lester Aldridge to new heights."

Tom Alder expressed enthusiasm about the new position, stating, "It is an honour to take on this role alongside such a talented team. I look forward to building upon the firm's proud legacy and recent



Tom Alder, Managing Partner at Lester Aldridge

sustained success. I am excited to lead the firm through continued sustainable growth, whilst continuing to foster a dynamic, collaborative environment where our people can thrive and best serve our clients." ■



Firms' News

Lester Aldridge Announces 2025 Promotions



Top row: Alice Thursfield, Yasmin Curry, Rebecca Bright, Deena Blake, Lucy Wadley.
Second row: Shaun Webb, Neeti Chauhan, Aneta Zaitlikova, Alexander Bickerstaff, Alexandra Bray

Lester Aldridge is pleased to announce the promotion of ten lawyers across the firm. This year's promotions reflect the continued strength of the firm across a range of sectors and specialisms, and the calibre of talent within its teams. The individuals promoted are based across all three of the firm's offices, underlining the breadth of expertise and dedication across the firm.

Promoted from Solicitor to Associate:

- Alexander Bickerstaff – Commercial Dispute Resolution
- Alexandra Bray – Corporate / Charities
- Aneta Zaitlikova – Real Estate Commercial

Promoted from Associate to Senior Associate:

- Rebecca Bright – International Private Client
- Neeti Chauhan – Residential Property
- Yasmin Curry – Real Estate Commercial
- Deena Blake – Real Estate Development
- Alice Thursfield – Health & Social Care
- Lucy Wadley – International Private Client
- Shaun Webb – Real Estate Development

Congratulations to all on this exciting milestone in their careers! ■



Bournemouth & District Law Society

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Firms' News

Steele Raymond expands team with trio of new hires

Steele Raymond is pleased to announce the addition of three new professionals - Emma Feltham, Carrie Butterworth, and Nicki Beswarick - to its Residential Development, Family, and Marketing teams.

Emma Feltham joins as a Senior Associate within the Residential Development Team. She brings a wealth of experience from a large regional firm, where she honed her skills representing a diverse range of clients, including developers, landowners, and investors. Emma specialises in navigating the complexities of development projects, working closely with clients to deliver tailored, commercial solutions. As part of the Residential Development Team, she will provide expert advice on acquisitions, overage, option agreements, disposals and development finance.

Carrie Butterworth joins the Family Team as a Chartered Legal Executive and a Fellow of the Chartered Institute of Legal Executives. With over 10 years of experience, she specialises in advising and assisting on a wide range of family law matters, such as divorce and separation, financial settlements, cohabitation issues for unmarried couples, injunction proceedings, and child arrangement matters.



L-R: Jennifer Rogerson, Carrie Butterworth, Nicki Beswarick, Emma Feltham

Nicki Beswarick assumes the role of Marketing Manager, leading strategic marketing initiatives. She will collaborate closely with Managing Partner, Jennifer Rogerson, team leaders, and the Board. With over 14 years of expertise in brand management and team leadership. ■

SteeleRaymond

Steele Raymond expands with acquisition of specialist construction law firm Reeves James

Steele Raymond has announced the acquisition of Reeves James, a specialist construction law practice based in Poundbury. Founded in 2020 by Chris Reeves, Reeves James has built a powerful reputation advising developers, contractors, sub-contractors, consultants, and individuals on both contentious and non-contentious construction matters.

The new construction team will be headed by Chris Reeves, who joins Steele Raymond as a Partner. Dual-qualified as a solicitor and Fellow of the Chartered Institute of Building, Chris is also a member of the Technology and Construction Solicitor's Association. He brings expertise in construction dispute resolution, with a focus on contractor claims, professional negligence, and complex technical disputes.

This expansion follows the recent opening of Steele Raymond's new office in Ocean Village, Southampton, on the 1st of April. ■



SteeleRaymond

DISCRIMINATION IN HOUSING LAW

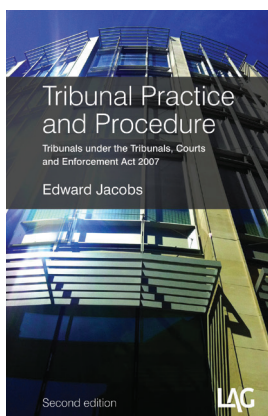
Tribunals under the Tribunals Courts and Enforcement Act 2007

LEGAL ACTION GROUP

The access to justice charity

By David Renton

ESSENTIAL READING FOR HOUSING PRACTITIONERS
ACTING FOR CLIENTS FACED WITH REPOSSESSION



An appreciation by Elizabeth Robson Taylor MA of Richmond Green Chambers and Phillip Taylor MBE, Head of Chambers, Reviews Editor, "The Barrister", and Mediator

There is very little that strikes more terror in the souls of its victims than the threat of impending homelessness via the judicial processes involved, which culminate in the process of eviction.

There ought to be an erudite and readable book about it — and there is, thanks to this very useful publication from the Legal Action Group (LAG), the access to justice charity, who are justly famed for producing legal texts accessible

not only to lawyers, but to the average concerned reader. David Renton, the author, is a barrister who represents tenants and mortgage holders embroiled in possession hearings.

Published in handy paperback format, the book offers a broad and concise coverage of 'the use of the principles of equality in housing law' — and equally of prime importance — the duty of landlords to fulfil their duties under the general categories of fitness and repossession.

As the publishers point out, the book covers the often complex and controversial matters, for example, of council houses let by housing associations, as well as houses held in thrall either to mortgages, or long leases. It should be added that homeowners in mortgage arrears suffer the same anxieties as those who rent — hence the general and urgent need for all practitioners to be duly bound in support of clients who struggle with these and other difficulties in the housing sector.

Practitioners and clients alike coming to grips with these problems will find this book especially helpful. As a concise work of reference, it truly excels. The precise introduction points directly to the subject of the book, namely the Equality Act of 2010 and its related principles — which apply both to business premises and residential properties.

Straightforward to navigate, the book has a detailed table of contents, enabling the reader — lawyer or not — to find the necessary advice they may be looking for, and for those doing further research, the book contains extensive footnotes, plus a detailed and useful index at the back.

Note too, the particular advantage of a 30-page section of precedents — including for example, the precedent entitled 'Case Summary Application to Set Aside Possession Order.' Also included in this concise text are Tables of Statutes, Statutory Instruments and also a Table of European and International Legislation.

For practitioners and clients alike, this book emerges as a practical and indispensable purchase. ■




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LEAP Estates Launches 2025 Will Writing Trends Report

Gifts, Charities, Exclusions and much more

L EAP Estates announces the launch of its 2025 Annual Report, offering a comprehensive snapshot of will writing activity and trends across England and Wales. The report is based on anonymised data from over 200,000 wills and more than 400,000 total documents, providing useful demographics and information relating to Estate planning, plus a range of fascinating trends. These trends include insights into charitable gifts, the frequency of branded gifts bequeathed, such as Rolex watches and Pandora jewellery, and family members excluded from Wills.

AI has a profound impact on staff productivity. Human resources are the most expensive and vital asset in any law firm. By taking over repetitive, low-value tasks like legal research, document drafting, and even matter analysis, AI allows lawyers to focus on higher-value activities that require human expertise. AI-driven research tools, for instance, sift through vast legal databases in a fraction of the time it would take a lawyer, offering comprehensive insights while reducing possible errors from lapses in human concentration.

This latest edition of the report draws on unique insights gathered through WillSuite, LEAP Estates' key integration partner. Since its integration into LEAP Estates and LEAP Legal Software in 2023, WillSuite has generated more than 900,000 wills and 1.7 million legal documents, with approximately 7,000 new documents being drafted every week. The software enables professionals across the estate planning industry to work more efficiently by reducing duplication, minimising errors, and ultimately delivering an improved service to clients.

Craig Matthews, CEO LEAP Estates/WillSuite says,

"For the first time we've been able to combine data from our LEAP, LEAP Estates and WillSuite users to bring about our largest report to date. Seeing an eight-fold increase in documents produced through our combined platform in just four years is really exciting and a testament to the hard work that goes into the development and support of our products."

The 2025 report explores a wide range of valuable facts and trends shaping the estate planning process. It covers key demographic insights, the types of trusts being included in wills, the frequency of charitable legacies and exclusions, and provides detail on funeral wishes and organ donation requests. It also highlights patterns in popular gifts and the specific brands frequently mentioned by testators. This data offers not only practical insight for the profession but also a fascinating perspective on evolving societal habits and values.

Among the most frequently gifted items in wills over the past year were cash, property, pets and chattels. Beyond these, the ten most popular specific gifts included jewellery, wedding rings, engagement rings, watches, and cars, followed by records, bonds, coins, instruments and medals.

The average mean value of a gift in 2024 was £15,138, calculated from 46,976 cash gifts included across 208,793 wills. Where specific brands were named, the most cited were Rolex, Pandora, Tag Heuer and Omega. Brands were more likely to be specified when the gifts related to jewellery or watches, whereas vehicles were typically described as "the family car".

The LEAP Estates 2025 Annual Report offers essential insights for professionals and an engaging look at the ways people in England and Wales are planning their legacies.

To access the full report, <https://www.leapestates.co.uk/brochures/annual-report/>. ■



By Craig Matthews
CEO, Leap Estates/WillSuite



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