SPRING 2026 ISSUE 216

Bournemouth & District Lawyer

Reverend Richard Coles *and Mark Proctor (BDLS President)*

INCLUDED IN THIS ISSUE:

- BDLS Annual Lunch
- BDLS Annual Dinner
- BDLS Lecture Programme
- When Your Name Becomes Case Law

Bournemouth & District Law Society

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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
Summer	June 2026	30 April 2026
Autumn	September 2026	
Winter	December 2026	
Spring	March 2027	

The copy deadline for receipt at the BDLS office for the next edition – the Summer issue – will be **30th April 2026**.

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

Follow us on Linkedin

https://www.linkedin.com/company/5483197/admin/

COVER INFORMATION

Reverend Richard Coles and Mark Proctor, BDLS President

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BDLS DIARY 2026

Fri 24 April 2026	**BDLS Annual Dinner** at The Highcliff Marriott Hotel, Bournemouth
Mon 15 June 2026	**BDLS Annual General Meeting** at The Captains Club Hotel, Christchurch
Fri 28 August 2026	**BDLS Summer BBQ** (venue to be confirmed)
Thur 8 - Sun 11 Oct 2026	**BDLS European Conference** to Gibraltar
Wed 4 Nov 2026	**Newly Qualified/Trainee Drinks Reception** (venue to be confirmed)
Fri 27 Nov 2026	**BDLS Christmas Wine Tasting** at Marsham Court Hotel, Bournemouth

The President's Column

Mark Proctor

As the days grow longer and the pace of the year quickens, it has been encouraging to reflect on the energy, engagement and collegiality across our membership.

That sense of collective purpose was on full display at our Annual Lunch, which I am delighted to say was attended by an extraordinary 595 members and guests and we were privileged this year to welcome the Reverend Richard Coles as our guest speaker.

To see such a remarkable turnout was both humbling and affirming. In a profession that often demands long hours and intense focus, it is heartening to know that our Society continues to provide a space where people want to come together and reconnect. I have to say a particular thanks to our sponsors: Wilson & Roe, Barclays, Key Business Professions, Paragon, On Point Data, Finders and PKF Francis Clark. I would like to also express my thanks to our members Nicola Lowe and Sam Linfiord who provided the first aid cover along with Alan Turle as our toastmaster and, of course, to the one person without whom this event simply would not be possible, our Society Manager, Mandy Heath.

Events like the Annual Lunch are about more than numbers or tradition. They are about community. In a legal landscape that continues to evolve at pace, the value of professional connection cannot be overstated. Whether you are at the beginning of your career, well established, or somewhere in between, the Society exists to support, represent and bring together solicitors across Bournemouth and the district.

As we look ahead to the coming months, the committee remains focused on delivering a programme that is relevant, inclusive and engaging. From training and networking to social events and wellbeing initiatives, our aim is to ensure that the Society reflects the needs and aspirations of its members. I am grateful to our officers, committee members and volunteers who give their time so generously to make this possible.

Spring is also a time for reflection and momentum. It invites us to take stock of what we have achieved and to look forward with optimism. If the success of our Annual Lunch is anything to go by, Bournemouth and District Law Society is in robust health, underpinned by an active, committed and enthusiastic membership.

Thank you to everyone who continues to support the Society, attend events, and contribute to its life and direction. I look forward to seeing many of you over the coming months in particular at our annual dinner in April when I am delighted that we will be joined by the current President of the Law Society for England and Wales, Mark Evans.■

Mark Proctor
BDLS President

BDLS ANNUAL LUNCH

at the Pavilion, Bournemouth - Wednesday 4 February 2026

BDLS Annual Lunch 2026 –
An Afternoon with Reverend Richard Coles

On 4 February, The Pavilion in Westover Road, Bournemouth was once again alive with excitement as 595 guests gathered for the BDLS Annual Lunch - one of the most anticipated events in the local legal calendar. The rapid sell-out of tickets confirms that this prestigious occasion remains a cornerstone for networking and celebration within our legal community.After a superb lunch, BDLS President, Mark Proctor, extended a warm welcome to the top table guests, including our guest speaker, Reverend Richard Coles, and our valued sponsors, thanking them for their continued support.

The highlight of the afternoon was an engaging and amusing speech by Reverend Richard Coles, renowned broadcaster, writer and former member of the pop duo *The Communards*. With his trademark wit and warmth, he captivated the audience, weaving together humorous anecdotes from his eclectic career. He shared fascinating glimpses into his journey from chart-topping musician to parish vicar and media personality, illustrating how diverse experiences can contribute to a fulfilling and purposeful life.

Following his talk, Richard generously took time to interact with guests, signing copies of his books and posing for photographs – a personal touch that made the afternoon even more memorable.

The BDLS Annual Lunch continues to be a highlight for the local legal profession, providing an opportunity to network, catch up with colleagues, and celebrate our shared commitment to the rule of law. This year's event was no exception, elevated by Richard Coles' unique perspective and engaging presence.

A huge thank you to our sponsors – Paragon, Wilson & Roe, PKF Francis Clark, Finders, On Point Data, Key Business Professions and Barclays – for their invaluable support in making this event possible. ■

MANDY HEATH
BDLS Society Manager

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Key Business Professions
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WILSON&ROE HIGH COURT ENFORCEMENT
On Point Data
BARCLAYS

Clementine Saulnier, Jenny Sanderson and Eloise Butterworth

BDLS ANNUAL LUNCH

at the Pavilion, Bournemouth - Wednesday 4 February 2026

Nicola Lowe and Rebekah Taylor

David Moakes, Alan Taylor, Laura Fitzgerald and Rachel Lee

Dan Tout and Ashley Hinwood

Ben Dilling, Mark Proctor, Ana Dilling and Mandy Heath

Kevin Johnson, Wilfred Gomez, Jeremy Dorkins and Leanne Lolley

Michael Newbold, Ryan Senior and Nick Lawrence

BDLS ANNUAL LUNCH

at the Pavilion, Bournemouth - Wednesday 4 February 2026

Jason Barnett, Nikki Woodcock and Dean Williams

Alice Toop, Abi Sinden, Emma Pope and Jonny Muncer

Ruth Elkins and Iain McTaggart

Jean Cross, Louise Standring, Christine Hereward, John Samtani and Paul Waters.

Tim Sharpley and Richard Tombs

Nick Dell, Deena Blake, Karla Cooper, Georgina Baverstock, Mark Benham, Tessa Vincent and Phoebe Chandler

BDLS ANNUAL LUNCH

at the Pavilion, Bournemouth - Wednesday 4 February 2026

Marc Del Llano and Nicola Bennetts

J-P Schulz, Adam Pinkney and Elizabeth Bowden

Lauren Day, Ryan Senior, Reverend Richard Coles and Mark Proctor

Helen Bean and Kayleigh Medland

Sonia Dunning, Tiffany Sherriff and Charmaine Bennett

Mike Owen, Dr Alan Fryer and Adrian Harding

BDLS
Annual Dinner

Friday 24 April 2026 19:00 – 19:30 until late
Highcliff Marriott, Bournemouth

Guest Speaker
Mark Evans
President of The Law Society of England & Wales

The Annual Dinner, a highlight of the BDLS calendar, will once again take place at the beautiful Bournemouth Highcliff Marriott Hotel on Friday 24 April.

We are honoured to welcome our guest speaker, Mark Evans, President of The Law Society of England & Wales.

This prestigious black tie event is open to all Solicitors & trainees, CILEX members, Notaries, Barristers, Judges and Members of BDLS
The flyer can be downloaded here:
https://www.bournemouthlaw.com/res/Annual Dinner Flyer 24.4.2026.pdf

Please note: The deadline for receipt of applications is
Friday 6 March 2026 ■

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Bournemouth & District Junior Lawyers Division

With the holidays firmly behind us, as we look forward to the impending spring and the longer days, the steps to achieving the goals I set out in my last update are under way.

Following the recent revamp of our website, we have increased our web content considerably. Our General Committee member, Alex Chance wrote the first of many blogposts to provide an insight into his journey to qualification. Alex has shared his views and experiences of the Solicitor Apprenticeship, giving clarity on the pros and cons that the pathway can offer. A great read, even for those already qualified, to gain an understanding of the opportunities on the table for aspiring solicitors.

In addition, I have prepared guidance for postgraduate students on the next steps in their careers, following a request from a local student. While my advice was tailored to aspiring solicitors, our wider committee member, Simon Haywood, kindly produced corresponding guidance for those considering the Bar. We have also prepared two 'Day in the Life' blogs, one from Trainee Solicitor Becky Hobell and another from newly qualified Solicitor Emily Shepard. Although not intended as a "spot the difference", these blogs offer a helpful comparison of the early stages of a solicitor's career.

Of great success was our annual Christmas Charity Quiz on 2 December, held at Aruba. With an incredible turnout of over 120 people, we were able to raise over £1,000 for the Water Lily Project. Congratulations once again to Preston Redman Solicitors, winners of the quiz, and to those who walked away with one of our fabulous raffle prizes.

We hosted a pottery painting evening in Bournemouth on 11 February at All Fired Up. This provided variety to our social calendar and allowed our network of young professionals to let their 'right brain' take over in an evening of leisure, creativity, and light refreshments. This was a sold out event of 45 attendees.

We also hosted an introductory climbing session at Project Climbing Centre Poole on 23 February. Encouraged by our climbing enthusiasts on the committee, Alexander Ayoub and Jenny Sanderson, this provided an informal and enjoyable opportunity for members to network while trying something new.

On 10 March, we will host reformer pilates in honour of International Women's Day and this event sold out on the same day that tickets were advertised.

On 19 March, we will host a cheese and wine networking evening at Marsham Court sponsored by Wilson and Roe, following the success of the BDLS' event in October last year. With a capacity of 100, we hope this will bring together both members and non-members for an opportunity to unwind and build connections.

Our rescheduled Pump Court event will be hosted in April at Steele Raymond during which recent updates within employment, family, and property law will be discussed. We are confident that this will be insightful and promote connections amongst those either working within or with an interest in those areas.

BDJLD Christmas Committee Celebration

With many more exciting and new events in the pipeline, I hope you keep an eye on our social media for the latest updates.

Finally, we reached the end of our Charity Year on 31 January having supported the wonderful Water Lily Project for the last 12 months. In order to select our new Charity of the Year, the committee firstly shared their ideas and then voted to shortlist those. The shortlist included: In Jolly Good Company, LawCare, and University Hospitals Dorset (UHD) NHS Charity. We then reached out to our mailing list offering them the opportunity to vote for their desired Charity of the Year. With the most votes going to In Jolly Good Company; a local charity which helps alleviate the physical and mental issues caused by loneliness and isolation. They are a dementia friendly organisation and work creatively with all ages to bring friendship, joy, and a sense of community to people living in Dorset. We look forward to working with and supporting them this year. ■

Daisy Kershaw
President for the BDJLD
https://www.bdjld.co.uk/

Welcome to our New BDLS Lecture Programme Sponsor - Stewart Title UK

We are delighted to announce that Stewart Title has joined us as a new sponsor for the Bournemouth & District Law Society Lecture Programme. We look forward to collaborating with them throughout the 2026 programme and beyond. Please join us in welcoming Stewart Title to our BDLS community. BDLS and Stewart Title will also be working together to deliver an exciting range of training courses for our members.

Why Three Isn't the Magic Number

Making sure that lawyers fully understand the different types of title insurance and the mechanics and regulatory requirements involved in issuing a policy is something Stewart Title takes very seriously. Certain topics and questions arise more frequently than others, and one of the most commonly asked is:

Do I Need to Obtain Three Quotes for Every Title Indemnity Policy?

In short: No.

A persistent belief within the profession is that lawyers must obtain three quotes for every title indemnity policy in order to meet regulatory obligations. Despite its popularity, this belief has no basis in the rules governing title insurance.

The provision of title insurance by lawyers is regulated by the Financial Conduct Authority (FCA) and by the relevant professional bodies, the Solicitors Regulation Authority (SRA) and the Council for Licensed Conveyancers (CLC). None of these bodies require a minimum number of quotes.

The Real Requirement: Understanding the Client's Needs

Lawyers have always been required to assess their client's circumstances and document this in a Demands and Needs Statement. Historically, these statements were often generic. However, the Insurance Distribution Directive (IDD), implemented in 2016, significantly raised the standard.

Under the IDD (now embedded in the FCA Handbook) Demands and Needs Statements must be detailed, specific and tailored to both the identified title defect and the individual property buyer. The focus is on ensuring that the recommended policy genuinely meets the client's needs, not on how many quotes were obtained.

There is no minimum or maximum number of quotes required. Obtaining an arbitrary number, such as three, does not, in itself, demonstrate compliance.

Why Price Alone is Not Enough

Cost should never be the sole factor in selecting a title indemnity policy. Lawyers must review the substance of each policy, including:

- Scope of cover
- Assumptions and exclusions
- Obligations placed on the insured
- Any limitations that may affect the client's position

Engaging directly with insurers or specialist brokers enables lawyers to clarify issues early and ensure that appropriate cover will be available when needed. By contrast, relying on a price comparison site without examining the underlying policy terms falls short of regulatory expectations.

Maintaining Competence and Compliance

Both the SRA and the CLC require that all staff involved in arranging title insurance receive regular training and updates on the applicable rules. Understanding the IDD, the FCA requirements and the professional obligations around title insurance are essential for ensuring that clients receive appropriate advice and protection.

Visit www.stewartsolution.com or follow Stewart Title UK on LinkedIn for more. ■

Robert Kelly
Director of Partnerships
Stewart Title UK

BDLS Lecture Programme 2026

KEY:

LIVE WEBINARS
FACE TO FACE LECTURES

Kindly sponsored by

DATE AND TIME	LECTURE	FORMAT	LECTURER	VENUE
	2026			
12 March 2026 11:00 – 12:00	**The Employment Rights Bill**	Live Webinar	Dominic Holmes	Zoom
19 March 2026 11:00 – 12:00	**Overage and Clawback**	Live Webinar	Richard Snape	Zoom
26 March 2026 12:30 – 17:15	**Civil Litigation Conference**	Face to Face	Various	Queens Hotel
16 April 2026 11:00 – 13:00	**Introduction to Commercial Leases**	Live Webinar	Hannah McKinley	Zoom
21 April 2026 11:00 – 12:00	**Mental Capacity in Practice: From MCA Principles to Pitfalls**	Live Webinar	Gary Spencer-Humphrey, Novacare	Zoom
23 April 2026 13:30 – 16:45	**Practical AI for Professionals: Tools, Prompting & Workflows**	Face to Face	Akber Datoo	Marsham Court Hotel
30 April 2026 11:00 – 12:00	**Issues when dealing with Trusts**	Live Webinar	Lesley King	Zoom
19 May 2026 11:00 – 12:00	**Dealing with HMRC response times for Income tax on Estates and IHT and how to address**	Live Webinar	Michael Culver	Zoom
21 May 2026 09:30 – 12:45	**Residential Conveyancing Update**	Face to Face	Ian Quayle and Nick Treble	Marsham Court Hotel
21 May 2026 14:00 – 17:15	**Commercial Property Update**	Face to Face	Ian Quayle and Nick Treble	Marsham Court Hotel
17 June 2026 09:15 – 16:30	**Family Law Conference**	Face to Face	Various	Marsham Court Hotel
24 June 2026 14:00 – 17:15	**IHT Planning on Pensions, in lifetime estate planning and estate administration**	Face to Face	John Bunker	Marsham Court Hotel
2 July 2026 13:30 – 16:45	**Topic to be confirmed**	Face to Face	Richard Snape	Marsham Court Hotel
8 July 2026 09:30 – 12:45	**Topic to be confirmed**	Face to Face	Helen Forster	Marsham Court Hotel
8 July 2026 14:00 – 17:15	**Topic to be confirmed**	Face to Face	Helen Forster	Marsham Court Hotel
15 July 2026 TBC	**Compliance Conference**	Face to Face	Various	Marsham Court Hotel

BDLS Lecture Programme 2026 (cont.)

DATE AND TIME	LECTURE	FORMAT	LECTURER	VENUE
9 and 10 September 2026 09:30 – 17:00	**Residential Conveyancing for Support Staff**	Face to Face	Ian Quayle	Marsham Court Hotel
17 September 2026 11:00 – 12:00	**Topic to be confirmed**	Live Webinar	Ian Quayle	Zoom
1 October 2026 TBC	**Private Client Conference**	Face to Face	Various	Queens Hotel
6 October 2026 11:00- 13:00	**Boundary Disputes: A Practical Approach**	Live Webinar	Hannah McKinley	Zoom
14 October 2025 TBC	**SAVE THE DATE Private Client Conference**	Face to Face	Various	TBC
15 October 2026 11:00- 12:00	**Leading With Focus: Managing Overwhelm, Time & Your Team Effectively**	Live Webinar	Jess Wiggins	Zoom
20 October 2026 13:30 – 16:45	**Practical AI – Title to be confirmed**	Face to Face	Akber Datoo	TBC
3 November 2026 11:00 – 12:00	**Topic to be confirmed**	Live Webinar	Richard Snape	Zoom
25 November 2026 TBC	**Property Law Conference**	Face to Face	Various	Queens Hotel

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 seven 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 Lectures and Webinars

WEBINAR Thursday 12 March 2026 – 11:00 – 12:00

Topic	**ADVISING CLIENTS ON THE EMPLOYMENT RIGHTS BILL**
Lecturer	**Dominic Holmes**
Cost	**£40 – Member and Associate Members of BDLS/Trainees** (Solicitors; Cilex; Apprentices) **£60 – Non Member of BDLS**

■ This session will provide an overview of the main employment law reforms in the Government's flagship Employment Rights Bill, with a specific focus on areas that are likely to be most relevant to the day-to-day operations of most employers, regardless of size or sector.
Specifically, we will look at what is coming into law, what is subject to further consultation and the questions and issues being raised by HR practitioners and in-house lawyers.

- Brief introduction and overview: The Employment Rights Bill and how we got here
- The Big Three:
  - o Enhanced dismissal protections – unfair dismissal rights after 6 months, collective redundancies and restricting "fire and rehire"
  - o Flexible working
  - o Anti-harassment measures and NDAs
- Other significant changes
  - o Family-friendly rights
  - o Zero-hours / low hours contracts and agency workers
  - o Statutory sick pay: Removal of waiting period and lower earnings limit
  - o Extending limitation periods
  - o Trade union reforms
- The timetable: What do employers need to be preparing for now?

WEBINAR Thursday 19 March 2026 – 11:00 – 12:00

Topic	**OVERAGE AND CLAWBACK**
Lecturer	**Richard Snape**
Cost	**£40 – Member and Associate Members of BDLS/Trainees** (Solicitors; Cilex; Apprentices) **£60 – Non Member of BDLS**

■ The webinar aims to look at this important but complicated area. It will stress many of the problems and their solutions.
Topics covered will include:

- Interpretation of overage clauses;
- SDLT and LTT and overage;
- Enforceability of overage against third parties;
- Case law on overage; and
- Overage and auctions.

LECTURE Thursday 26 March 2026 – 12:30 – 17:15

Topic	**CIVIL LITIGATION CONFERENCE**
Lecturer	**Greg Huitson-Little, Menzies LLP; Katherine Harper and Leah Alpren-Waterman - The Law Society Dispute Resolution Committee; Conor Maher, Ellis Jones and BDLS; His Honour Judge Ashby**
Venue	**Queens Hotel, Bournemouth**
Cost	**£120* – Member and Associate Members of BDLS/Trainees** (Solicitors; Cilex; Apprentices) **£160* – Non Member of BDLS**

*Price to include a buffet lunch on arrival
Please see flyer for full information
https://www.bournemouthlaw.com/res/Civil Ligitation Conference 26.3.26 Programme.pdf

Summary of Upcoming Lectures and Webinars (Cont.)

WEBINAR Thursday 16 April 2026 – 11:00 – 13:00

Topic	**INTRODUCTION TO COMMERCIAL LEASES**
Lecturer	**Hannah Mackinlay**
Cost	**£70 – Member and Associate Members of BDLS/Trainees** (Solicitors; Cilex; Apprentices) **£90 – Non Member of BDLS**

■ Commercial leases are not all the same and it's important to make the lease fit the property and the situation. This webinar will consider the key points on negotiating a commercial lease so you can deal with them with confidence. This course will cover:

- Heads of terms and the Lease Code
- Dealing with the CPSEs and EPC issues
- Key terms every time..
- The demise
- The rights
- The reservations
- Rent Reviews and the Upward Only ban
- Break clauses and Security of tenure
- Repairs and alterations
- Green Lease clause, EPC and Climate Change issues
- Assignment and underletting
- AGA sagas.
- Service Charges
- SDLT on commercial leases

WEBINAR Tuesday 21 April 2026 – 11:00 – 13:00

Topic	**MENTAL CAPACITY IN PRACTICE: FROM MCA PRINCIPLES TO PITFALLS**
Lecturer	**Gary Spencer-Humphrey**
Cost	**£20 – Member and Associate Members of BDLS/Trainees** (Solicitors; Cilex; Apprentices) **£40 – Non Member of BDLS**

■ Join Gary Spencer-Humphrey, independent social worker and expert capacity assessor, for this practical one-hour CPD session for lawyers working with capacity issues in day-to-day practice. You will leave with a clear framework for engaging with clients, supporting decision-making, and recognising red flags that may require further enquiry, specialist input, or a formal capacity assessment. Gary will share practical interviewing techniques, how to scaffold questions to explore understanding, retention and weighing of information, and practicable steps to support clients who may be neurodivergent or living with mild cognitive impairment.

What You Will Take Away:

- A rundown of the MCA cardinal principles.
- A structured approach to engaging with clients and supporting decision-making.
- Practical assessment and interviewing techniques for more meaningful client interactions.
- Strategies and reasonable adjustments for clients who may be neurodivergent or living with cognitive impairment.
- Increased awareness of amber and red flags when supporting vulnerable clients (and when to escalate for a formal capacity assessment).

LECTURE Thursday 23 April 2026 – 13:30 – 16:45

Topic	**PRACTICAL AI FOR PROFESSIONALS - TOOLS, PROMPTING AND WORKFLOWS**
Lecturer	**Akber Datoo**
Venue	**Marsham Court Hotel, Bournemouth**
Cost	**£60 – Member and Associate Members of BDLS/Trainees** (Solicitors; Cilex; Apprentices) **£85 – Non Member of BDLS**

■ This hands-on session will cover:

What You Will Take Away:

- What AI is good for (and where it goes wrong): quick, practical dos & don'ts
- Which platforms to use for which tasks (e.g., ChatGPT, Microsoft Copilot, Gemini/Claude/Perplexity—how to choose)
- How to write prompts that work: simple repeatable frameworks
- Working with documents safely: redaction/sanitisation, confidentiality, and "what not to paste in"
- Moving from Personal to Enterprise AI

The Council Member's Report

PETER WATSON-LEE
Law Society Council Member for Dorset

THE MINISTRY OF JUSTICE'S CLIENT'S INTEREST GRAB

Having only recently pushed back on the extraordinary proposal by the SRA to abolish client accounts, the latest curve ball has come out of the blue from the Ministry of Justice.

They are proposing that 75% of the interest earned on client's accounts should now be given not to the client, but to them, the Ministry of Justice. It is not clear whether this is meant as a tax, a levy or just a pure confiscation. And the money raised are not intended to go towards some noble cause such as legal aid – just into the Ministry of Justice's own coffers.

They issued the shortest of consultations which which has now just been extended to 9th March 2026.

The Law Society has issued a strong response. The whole scheme would be fraught with difficulties as to how it would even work, let alone the unfairness of the scheme to both clients and solicitors firms. Why should vulnerable client's be deprived of interest properly due on their monies? Not to mention it being a possible nail in the coffin for smaller and medium sized firms who already struggle on wafer thin profit margins.

My fear is that one unintended consequence would be to give our unregulated and less scrupulous competitors a significant advantage. Why use a solicitor to administer an estate if using an unregulated provider would be able to give you interest on your funds?

SRA NEWS

On a more encouraging note, early reports on the new C.E.O. of the SRA, Sarah Rapson have been positive. She indicates she is keen to work 'openly and collaboratively'. An example is that she has been happy to set up a working party to include our Law Society President Mark Evans to review our many concerns over how the SQE is working.

No news yet on when we will be having a new Chair of the Board of the SRA. Meanwhile, the regulator has turned its attention to firms engaged in high volume claims—those ubiquitous "Were you mis sold…?" adverts that seem to be everywhere. This sector was at the heart of the collapse of SSB Law where the firm had taken on many clients sourced by claim managements firms and failed to put in place the 'no win, no fee' insurance required, with disastrous consequences. It is understood the SRA has already intervened in several such firms and is reportedly monitoring around 75 more.

FINANCIAL SERVICES AUTHORITY TO OVERSEE AML

As if one regulator weren't enough, the government has announced that anti money laundering oversight will shift from the SRA to the Financial Services Authority. The Law Society is in active discussions with ministers, pointing out the obvious: this would create duplication, confusion, and - no doubt - another regulatory fee. A small consolation is that it is likely to be a year or two before the mechanics of the change will be worked out and the move implemented. But the chances that any fee charged by the FCA will be matched by an equal reduction of fee by the SRA is, I suspect, slim.

HMRC JOINS THE PARTY

Not to be left out, HMRC has announced that from April, anyone interacting with them in any capacity will need to register as a Tax Adviser. This is likely to catch out many of us and it appears to include routine correspondence and the submission of forms such as the IHT400 and SDLT returns. The only silver lining is that, for now at least, no fee has been mentioned. We live in hope.

A SMALL BUT WELCOME WIN: THE MORTGAGE LENDERS' HANDBOOK

Amid the regulatory gloom, a rare victory. Following strong objections from the Law Society and others, UK Finance has abandoned its rather audacious proposal that solicitors should pay to use the Mortgage Lenders' Handbook. A rare example of some common sense. ■

Peter Watson-Lee
Law Society Council Member for Dorset

Meeting of the Southern Area Association of Law Societies, where Council members and local Presidents (including BDLS) gathered to discuss current issues.

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

JOIN Bournemouth & District Law Society (BDLS)

At BDLS we pride ourselves on being a welcoming and inclusive community for legal professionals at all stages of their careers. Our Society offers a wide range of professional, educational and social opportunities designed to support your development and help you connect with others in the local legal community. We also serve as a strong collective voice for the legal profession in our region, advocating on matters that affect our members and the wider legal landscape. For further information visit www.bournemouthlaw.com

Membership Categories	£
Standard Membership	£95
Associate Membership	£70
Concessions:	
Member qualified for less than 5 years	£60
Member employed in a judicial or quasi-judicial position	£53
Fully retired member	£45
Member not in employment	£15
Public Sector Member	£0
Honorary Life Member	£0
Associate Trainee Solicitor Member/Legal Executive	£0

Discounts are applicable for Standard and Associate member categories as follows:

Between 10 and 15 paying members	12.5% discount for Standard and Associate Members
16 or more paying members	17.5% discount for Standard and Associate Members with a **maximum payable of £2,500**

Our annual subscription year runs from 1 January – 31 December. If your firm has staff changes during the year, please inform the BDLS Office at office@bournemouthlaw.com as soon as possible so we can update our database. For any new starters, we can adjust the fee due according to their start date.

WHEN YOUR NAME BECOMES CASE LAW: REFLECTIONS ON LOWE V DANIELLS [2025] EWHC 3297 (CH)

For many lawyers, seeing your own name appear in a reported judgment is a rare, career defining moment - especially when the case contributes something genuinely useful to the development of the law. Lowe v Daniells is one such example: a fascinating and practical High Court ruling dealing with the increasingly common problem of a beneficiary who simply refuses to engage. In this article, BDLS member, Nicola Lowe, shares insight into the circumstances that led to the claim and why the judgment may prove significant for practitioners navigating complex or obstructive estate administrations.

Is being a plaintiff in a reported case when the law reaches its finest hour during ones career? That may be a bit of an exaggeration but nonetheless, having your name attached to a case which either provides guidance on a point of law, establishes a legal principle or clarifies existing law, was an exciting point in my career.

The case is a significant ruling by the High Court in England and Wales regarding the handling of a residuary beneficiary who refused to engage with the administration of an estate.

Background

My client died, leaving the residuary estate, which amounted to £185,000, to one of her granddaughters. As administrator I contacted the beneficiary who would not engage with me despite numerous attempts, by various means including the use of a process server. She became aggressive and said that I was harassing her and that I was not to contact her. The actual case provides more details of her reaction which I do not intend to reiterate here! I was left in a position where I was unable to distribute the estate without leave of the Court and so made an application to pay the money into Court.

Legal Issues and Solution

HHJ Paul Matthews considered whether Miss Daniells conduct had amounted to a disclaimer or rejection of her gift. The Court noted that , in law, a gift is assumed to be accepted upon the death of the testator until the beneficiary explicitly dissents. As she had not formally renounced her gift the Court was hesitant to definitively declare a disclaimer based on her conduct. Rather than pass the problem to the Court HHJ Matthews decided that , whilst this case did not fall within the definition of how a Benjamin order would usually be applied it was construed that there could be some flexibility in its application to extend beyond a beneficiary that could not be found or traced to one that refused to engage.

The Courts decision permitted me as administrator, to distribute the residue as if Miss Daniells had disclaimed her gift whilst protecting me from a claim. It preserved Miss Daniell's rights to bring a claim against the substitute beneficiaries should she change her mind and the onus would be on her to bring such a claim.

Whilst capacity was mentioned, there is the presumption of capacity and there was nothing to suggest Miss Daniells did not have capacity as she had engaged coherently with the process server.

Significance and Key Takeaways.

The Court in taking a pragmatic approach aimed to prevent estates from being frozen by uncooperative beneficiaries. It prevented the problem being passed to the Court

The judgement provided a safe avenue for administrators to proceed and protects them from a devastit claim (personal liability for misadministration of the estate).

It shows how Benjamin Orders can be used flexibly and are not just for missing beneficiaries but also those that refuse to engage or cannot be contacted.

It emphasises the need to join other parties such as substitute beneficiaries to the proceedings even when applying for monies to be paid into Court.

I understand that the last time a local solicitor had their name immortalized in a case was Roger Street in Street v Mountford [1985] UKHL 4 some 40 years ago. ■

Nicola Lowe

Managing Partner, Harold G Walker Solicitors

WELLBEING & DIVERSITY SUB-COMMITTEE:

SUPPORTING THE WELLBEING OF OUR LEGAL COMMUNITY

As your Wellbeing & Diversity Sub-Committee, we don't just want to be a reactive committee for those that are having a difficult time, we also want to be proactive and offer opportunities for you to meet together to help with your mental and physical health. The Society has a cricket team who are always looking for new players or supporters to cheer them on, Ed Holmes organises regular Sunday walks and we also have a Legal Runners group, but we would like to be able to facilitate more and your suggestions are always welcome.

Are you interested in setting up other sports teams such as a netball team? Would you like an opportunity to meet with others to go bowling or play pool or snooker? Would you like to learn to play pickleball? Or would you just like to meet up for coffee and cake? Please do get in touch and let us know if any of these are of interest to you, or if you have any other suggestions, we would love to hear them. Please feel free to call me on 01202 871311 or email me Sam.Linford@luffbrookcarter.co.uk

We would like to take this opportunity to remind you that the wellbeing of all those that work in our local legal community is very important. Whilst working in the law can be highly rewarding, it can also be stressful and demanding and at times we can feel overwhelmed with nowhere to turn. As a Society we are fortunate to have a group of Mental Health First Aiders who are available for you to talk to confidentially. Their details are set out on the next page and are also available on the BDLS website: https://www.bournemouthlaw.com/wellbeingsupport ■

Sam Linford

Chair, Wellbeing and Diversity Sub-Committee

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:

Mental Health First Aider
MHFA England

Mark Kiteley
mkiteley@rawlinsdavyreeves.com
Tel: 01202 558844

Edward Holmes
egholmes@meesons-spurlings.co.uk
Tel: 01425 484420

Mandy Heath
mandyjheath@hotmail.co.uk
Tel: 07763 833256

Alan Turle
a.turle51@gmail.com
Tel: 07720 406962

Maria Evans
maria.evans@trethowans.com
Tel: 01202 338580

Liam Fennessey
lf@prestonredman.co.uk
Tel: 07776 653645

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

Sally Crawford
Sallycrawf@gmail.com
Tel: 07973 148264

Maddy Longland
ml@mjplaw.co.uk
Tel: 01202 842929

Lauren Mars
lauren.mars@teeslaw.com
Tel: 07764 582128

Sarah Unsworth
Bacchante2012@gmail.com
Tel: 01590 676933

Marie Harder
(mental health first responder)
mharder@coles-miller.co.uk
Tel: 01202 338885

Fiona Pawsey
fiona@newnham-jordan.co.uk
Tel: 07891 584843

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.

Please visit our website Membership Benefits to view our full list of benefits

LawCare

Make time to talk about anxiety

Talking openly and honestly about mental health at work can make a real difference. It helps reduce stigma, ease isolation, and makes it easier for people to ask for support when they need it. This is particularly important in the legal sector, where anxiety is common but often hidden. If you're feeling anxious or on edge, you're not alone. Many people working in law experience similar feelings.

- LawCare's Life in the Law 2025 report found that half of respondents said they felt anxious often, very often or all of the time in the past year.
- Anxiety is one of the most common reasons people contact LawCare for support. In 2025, 34% of people who got in touch said anxiety was a key concern.

We regularly hear from people who feel overwhelmed or unable to switch off from work. As one person told us:

> "I was becoming more and more anxious about the prospect of court and started to have physical symptoms. I had a constant knot in my stomach, which grew over the weekend knowing I had to face work again on Monday."

Heavy workloads, tight deadlines and responsibility for clients all add pressure. A culture that values perfection and pushing on, even when things feel hard, can make anxiety worse. Ongoing change and uncertainty in the profession can also leave people feeling unsettled.

What anxiety can look and feel like

Even though anxiety is very common, many people still find it hard to talk about it. Stigma, fear of being judged, or worries about how it might affect their career can stop people from speaking up.

Talking openly can help.

- Sharing how you feel can make you feel less alone, help you see things more clearly, and make it easier to get support.
- Listening to someone else without judging them can also make a big difference. You don't need to fix things or have the right words. Being kind and listening is often enough.

How to start a conversation

Conversations about mental health don't need to be perfect or planned. Choose a time and place where the person feels comfortable; this might be a quiet call, a walk, or a coffee. Often, a simple "How are you?" is enough to open the door.
Give the person your full attention, avoid interrupting, and use open questions like "What would help right now?" Respond with empathy rather than advice and avoid clichés or turning the conversation back to yourself.
If it feels appropriate, gently signpost to further support, such as LawCare, HR, a trusted colleague, or their GP. Sometimes, knowing support is there is what matters most.

Practical ways to cope and support one another

There is no single way to manage anxiety, but many things can help. For some people, simply talking about how they feel can bring relief. Others find it helpful to speak to someone they trust, such as a colleague, manager, friend or family member. Setting limits where possible, taking regular breaks, and finding ways to switch off outside work can also make a difference.

Managers and leaders play an important role. Creating a workplace where people feel safe to talk about their mental health can help reduce stigma and encourage earlier support. This might include regular check-ins, being open about your own wellbeing, and responding with kindness when someone shares how they are feeling.

If anxiety is affecting your everyday life, you do not have to cope on your own and it may be time to seek professional help. You can talk to your GP or see if your workplace offers support. You can also get in touch with LawCare for free, confidential support. ■

LawCare's helpline is available to anyone in the legal sector by phone, email and online chat:

- Call: 0800 279 6888
- Email: support@lawcare.org.uk
- Online chat: www.lawcare.org.uk

You can also find more information and support on the LawCare website, including resources about anxiety:

Anxiety Resources - LawCare

BDLS
LEGALRUNNER GROUP

The legal profession isn't known for being slow-paced—but sometimes we all need a break from our desks, our deadlines, and our ever-growing inboxes. That's where Legal Runners comes in: your local running group created by legal professionals, for legal professionals. Legal Runners is an initiative set up by Law Society President, Mark Evans, and is making an impact in the legal industry up and down the country. If you would like to read more about how Legal Runner got started and the purpose of the initiative please take a look at this fantastic blog from Mark himself: How a running club is helping lawyers talk about mental health | The Law Society.

As your local representative for Bournemouth, I am looking to create an inclusive and community focused running/walking group. No pace is too slow and the initiative is designed to get everyone in the legal industry out moving in the fresh air, irrespective of fitness level or experience. I will be continuing to organise regular get togethers as we head into the spring, and with the lighter and brighter evenings now not too far in the distance! Please get in touch for details of the next planned run. I am also an avid parkrunner, so if you are interested in connecting at one of the local parkruns, I would love to hear from you.

I am keen to hear from BDLS members with ideas and suggestions for social running in and around Bournemouth to help get this group off the ground, so please do feel free to get in touch with any ideas. If you would like to be kept updated with upcoming events, to register your interest or get some more information, please feel free to get in touch on email (kate.lewis@trethowans.com) or reach out on LinkedIn.

I really look forward to hearing from you and getting more members of our local legal community up and running soon! ■

Kate Lewis
Bournemouth LegalRunner Group

BROWNSEA OPEN AIR THEATRE (BOAT) Are Seeking Sponsorship

BOAT are a long-established part of the cultural landscape of the local district having been performing outdoor Shakespeare every summer for over 60 years. We have traditionally received excellent national and regional coverage and have been featured in the Guardian as one of the UK's Top 10 Open Air Theatre Venues.

With our strong emphasis on community and inclusion together with a reputation for quality and professionalism, we believe we can offer an attractive opportunity for a local law firm to associate their brand with ours.

As a registered charity (no.2788003), we endeavour to give donations to local good causes after each year's production, either from any profits made or from our reserves. All those involved are unpaid volunteers. We have a 'open to all' policy and in a typical year we have in excess of 150 local volunteers working together to achieve the highest production standards.

Our traditional home has been Brownsea Island but we have recently relocated to the mainland and now perform within the beautiful grounds of Canford School. Our 2025 production of The Winter's Tale was a great success and we are currently working on The Tempest which will again be performed within the grounds of Canford School in summer 2026.

Any prospective sponsor could expect their logo to appear on our publicity materials including our website and social media accounts, printed flyers, posters, tickets, together with a full page advertisement in our glossy A4 theatre programme. In a typical year we welcome between 3000 and 4000 patrons to see our show and our marketing reaches many more through our data base of previous customers and volunteers. We imagine that the broad demographic of our patrons would be attractive to a local law firm. Our relationship with Canford School means that in addition we can also offer significant marketing exposure to the parents, pupils and alumni of Canford School.

Our website will give you more details of who we are and what we do: brownsea-theatre.co.uk

If the venture is of interest, you can contact Joanne Owen on 07798 691482 or email Dorothy Burton boatsecretary24@gmail.com to discuss further. A speedy response will ensure maximum publicity as tickets for our 2026 production of The Tempest will be going on sale from 1st March. ■

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Firms' News

Paris Smith LLP welcomes two new senior recruits to Bournemouth office

Paris Smith is delighted to announce the arrival of two highly experienced property lawyers to its Bournemouth office.

Deborah Fenton joins as a Senior Associate, specialising in residential property matters. With extensive expertise in advising clients on all aspects of residential transactions, Deborah brings a wealth of knowledge and a client-focused approach that will enhance the firm's offering in this area.

Kerry Houston-Kypta joins as a Partner, focusing on commercial property matters. Kerry has significant experience of advising on complex property transactions, property finance and investment work including SIPPS. Her appointment further bolsters the firm's commercial property practice, ensuring clients benefit from strategic advice and practical solutions. ■

Deborah Fenton and Kerry Houston-Kypta

Paris Smith
LEGAL EXCELLENCE

Lester Aldridge Congratulates Two Newly Qualified Solicitors

Lester Aldridge is delighted to announce that Sadie Chambers and Oliver Jarvis have successfully passed their SQE2 assessments and qualified as solicitors. Both Sadie and Oliver began their careers at Lester Aldridge as paralegals before joining LA's Graduate Solicitor Apprenticeship programme, combining work and study.

Sadie joins their Private Wealth team, where she specialises in Wills, Powers of Attorney, Court of Protection Deputyships, trust matters and estate planning.

Oliver joins their Residential Property & Conveyancing team, specialising in all aspects of residential property transactions. ■

Sadie Chambers and Oliver Jarvis

Lester Aldridge

Firms' News

A Warm Welcome to Our New Team Members

We're delighted to share the announcement of six fantastic additions to our fee earning teams in 2025: **Genette Gale, Andrew Dao, Jamie Blinko, Emma Bryant, Iain Lorrimer and Sara West.** We are delighted to strengthen and grow our team with such professional and well-regarded individuals.

The Return of Iain Lorrimer
Iain originally trained with our firm many years ago and is a qualified FILEX. Iain has chosen to return to the place where it all began. We couldn't be happier to welcome him back. Familiar, reliable, and somehow even better with time, he brings warmth and expertise in equal measure.
Iain's has a wealth of knowledge, a strong reputation, and client-focused approach.

Emma Bryant
Emma is a highly regarded solicitor whose approachable nature and expert knowledge has earned her an excellent name in the industry. She brings fresh energy, technical expertise, and a commitment to making even the most complex transactions feel and manageable.

Jamie Blinko
Jamie recently qualified as a solicitor. He has hit the ground running in the Private Client Team; an area in which he gained lots of experience as a trainee solicitor. He is driven and meticulous with a friendly and calm nature, making him a real asset to the Firm. We welcome his enthusiasm in the team!

Genette Gale
Genette is an incredibly experienced family solicitor with an impressive reputation in the industry. Genette is able to get to the fundamental facts of a case quickly, but with the upmost compassion and kindness. Genette is a perfectionist, leaving no stone unturned for her clients, to ensure their best interests are protected.

Andrew Dao
Andrew is a well respected residential and commercial solicitor. Andrew is working in both our commercial property and litigation teams. Andrew joined us with a wealth of knowledge and experience. He is a true gentleman, whose intelligence is clear to all who meet him. He has injected fresh energy to the departments and his conscientious and diligent approach to his work is admirable.

Sara West
Sara is member of ILEX and joined our commercial property team. Sara has extensive knowledge in commercial property matters. She is efficient and methodical in her approach to client matters. Sara values her clients and works hard to the best job she possibly can for them. .

At HGW we are very proud of our dynamic and professional team. With these new additions to the Firm, we are even better equipped to provide exceptional service and legal advice to our clients. ■

Firms' News

Stephens Scown announces senior appointments

Stephens Scown has announced key new appointments at its new office in Bournemouth, including two new partners and a new senior associate.

Victoria Jones and Joy Vollans join as new partners in the firm's Bournemouth team. Also, Senior Associate, Roisin Fisher, has joined Commercial Property Partner, Chris Twaits, in the Real Estate team.

Victoria Jones brings over 20 years' expertise in inheritance and trust disputes, working with high-net-worth families on complex wills, trusts, and estate cases. She also has extensive experience supporting vulnerable adults and their families in Court of Protection matters, with a strong focus on tackling elder financial fraud.

Having joined the firm in 2024 as Strategic Development Consultant, Joy Vollans has been instrumental in bringing the firm's Dorset growth strategy to life and will play a major role in driving the success of the firm's presence in the region.

L-R: Joy Vollans, Victoria Jones, Roisin Fisher and Chris Twaits.

Following the appointment of Real Estate Partner Chris Twaits in 2025, the firm has also welcomed Roisin Fisher to its Bournemouth office as a Senior Associate in the Commercial Property team. Having worked with Chris previously, she will be working alongside him to help build the team further. ■

Frettens Expands with New Office in Wimborne

Frettens Solicitors has announced the opening of a brand new office in central Wimborne, marking the firm's next step in its ongoing growth across Dorset and the wider BCP area.

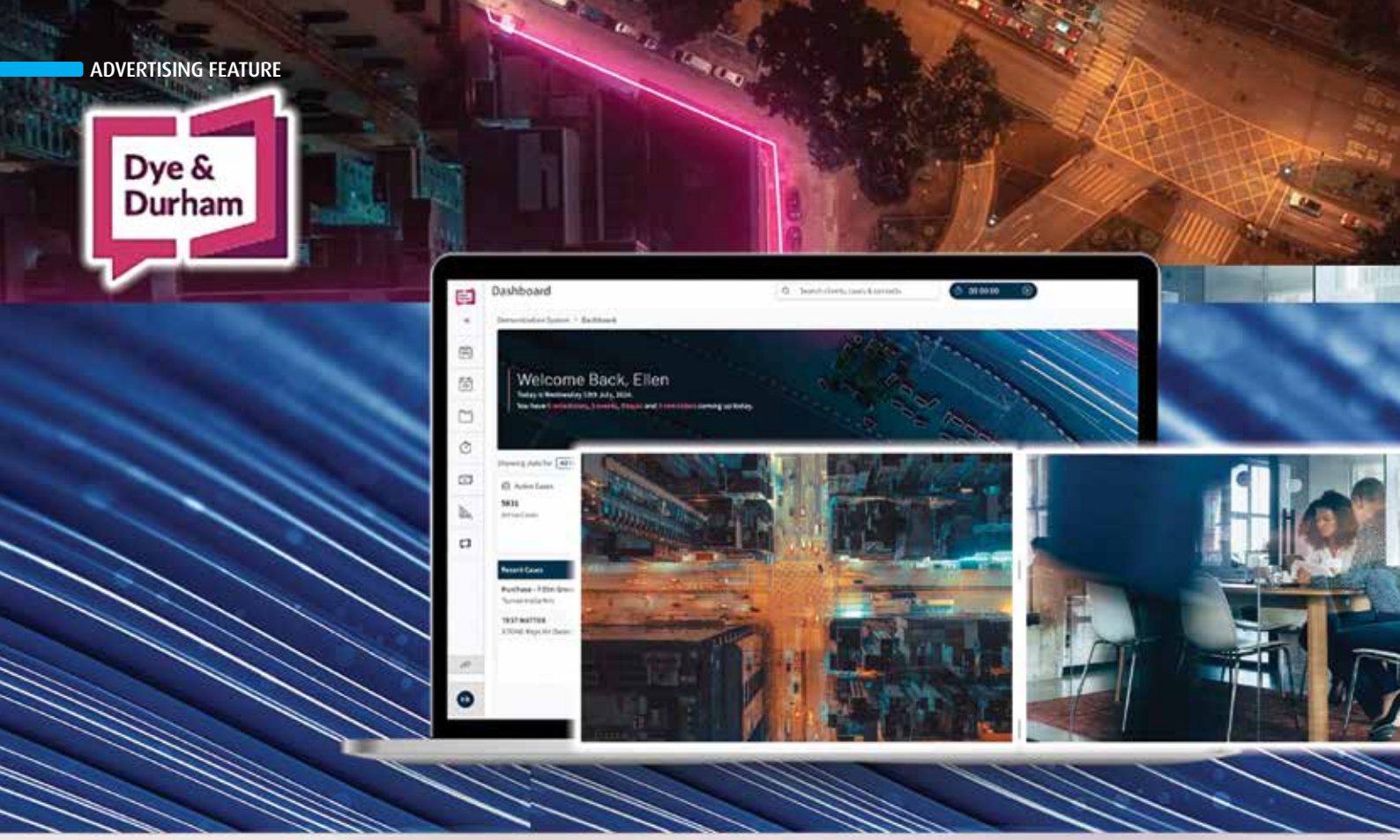
The move comes as a natural progression for the team, explains Clare Hallett, Partner and Head of the new Wimborne office: "We already have many clients and partners in and around Wimborne, and many of our team live here, so opening an office in the town is an obvious step."

The Wimborne office, based just off the main square in Church Street, will provide the full range of Frettens' legal services for both businesses and individuals.

"We love the town and love the space we have moved into," says Clare. "We can't wait to build on the existing relationships we have in Wimborne and become an integral part of the local business community, like we have in Christchurch and Ringwood."

Frettens staff celebrate the opening of the firm's new Wimborne office

More than 20 staff will be based in the Wimborne office initially, with capacity for up to 40. ■



Dye & Durham Enhances AML Compliance with Credas Integration in its Unity Practice Management

Dye & Durham UK, one of the UK's leading legal technology providers, has announced the integration of a new suite of Anti-Money Laundering (AML) and Know Your Customer (KYC) tools into its Unity Practice Management platform, powered by market-leading digital ID provider Credas.

This launch comes at a crucial time, as the Solicitors Regulation Authority (SRA) continues to issue significant five-figure fines for non-compliance of AML regulations – with one firm receiving a penalty of £114,000 in July this year*. For legal practices, efficient, auditable onboarding and risk checks are no longer optional but are essential.

With the Credas integration, firms can now trigger advanced compliance checks on a Pay-As-You-Go basis directly within Unity, streamlining the entire process while ensuring real time results, full audit trails and secure document handling.

The offering includes:

- Biometric ID & Instant AML Check: Combines standard AML checks with facial recognition, liveness detection and NFC-based document verification.
- Safe Harbour Checks (Vendor & Purchaser): Specifically designed to meet Land Registry's Safe Harbour standards.
- Source of Funds Verification: Dynamic questionnaires and open banking integration for thorough yet efficient due diligence.

Results are returned and stored within the Unity case file, supporting compliance, audit-readiness and risk mitigation.

Confirms Chris Shingler, Technical Product Manager at Dye & Durham UK: "The reality is that older ID checking systems just aren't fit for today's threats, and that's before you even consider how cumbersome they are to manage. Our new Credas integration means firms can trigger checks with the data they already hold, see live progress and store every result securely, all without ever leaving Unity.

"From a compliance point of view, it's a game changer. The SRA is cracking down hard and we're reading news headlines reporting record fines every week. Our integration gives firms the assurance that they're on top of their AML duties, with no manual tracking, no risk of missing documentation and everything in one place."

Credas already supports over 350,000 AML checks every month, is involved in more than half of all UK property transactions and boasts a 4.6-star independent review rating.

Archie Barnett, Manager of the Client Delivery Team at Dye & Durham UK added: "This isn't just about convenience: it's about protecting your firm, your clients and your reputation from financial crime and non-compliance. All of Dye & Durham's customers can now benefit from the same secure, scalable compliance infrastructure as some of the biggest names in the sector."

For more information on Dye & Durham UK, visit: www.dyedurham.co.uk ■

EVERYTHING YOU NEED, ALL IN ONE PLACE.

Dye & Durham brings together some of the UK's most trusted legal technology and service providers, all under one roof.

From Business Law to Property Due Diligence, Practice Management, and Compliance — our trusted solutions are backed by decades of expertise supporting the UK legal sector.

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A Dye & Durham Company

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Lawyer Checker
A Dye & Durham Company

CREDAS
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Dye & Durham

Strategic Partner
The Law Society

Explore more at
dyedurham.co.uk

Situations Vacant

Partner / Senior Associate 8 years' PQE +

With a new office opened in Bournemouth in 2025, Stephens Scown is on an exciting growth journey, and we're looking for exceptional legal talent to help drive our Dorset team forward.
We're not just expanding; we're building something special. If you're a Partner or a Senior Associate ready to step up, this is your chance to make your mark in a growing office with the full backing of a highly respected regional firm.

To support our strategic growth, we are actively seeking ambitious Partners and Senior Associates in the following key practice areas:

- **Private Client**
- **Rural or Energy**
- **Residential Property**
- **Corporate & Commercial**

We would also welcome contact from senior lawyers in other practice areas or with specialist legal expertise and a passion for delivering outstanding client service.

Why work for Stephens Scown?

Stephens Scown is a leading South West law firm with a reputation for doing things differently.

We are a full-service regional heavyweight law firm with a standout client base, and we are committed to delivering outstanding levels of client service.

Employee-owned, B Corp™ Certified, and recognised for our workplace culture as one of the Sunday Times Best Places to Work in the UK, we're proud of our record of providing values-led legal services across the South West.

What We Can Offer You

This is more than just a role, it's a chance to be part of a values-driven firm doing standout work for standout clients, all while making a difference in our communities.

We offer a competitive salary and an impressive array of benefits and rewards. Not least of these is through the Firm's employee-ownership status, where every eligible employee is listened to, helps to realise our vision and receives an equal share in our annual profit-share.

Our hybrid and flexible working approach empowers our people to balance time between home and the office in a way that supports their wellbeing. With a vibrant, supportive culture, we help colleagues develop their skills and thrive – both at work and in life.

Why Stephens Scown?

Being Great Matters…
Working here is something else entirely. It's a place where we can step up to tough challenges with people so good they inspire us to be better. We proudly work in a beautiful part of the country, go beyond expectations and achieve things that matter.

Owning It Matters…
We're the UK's first major employee-owned law firm. But more than this, we're people-centred, people-powered. We do what it takes to help each other overcome every challenge. Whatever's happening in the world, empowering our people is what matters.

Doing Good Matters…
Our communities and colleagues give us a lot to be thankful for. So we try to make them feel as valued as our clients. Whether we're digging deep and giving our time and money, picking up rubbish from our streets and beaches, at Stephens Scown, if it's right, it matters.

Having Fun Matters…
We might have the expertise of a top city firm, but outside our offices there's not a skyscraper in sight. Whether we're getting to know our clients on our local beach or having fun in the park with colleagues, we're all about living a life enriched by work. Making the fun matter.

For more information, visit our website **Stephens-Scown.co.uk** or contact **Izzy Shannon** on **I.Shannon@stephens-scown.co.uk** to find out more. ■

Situations Vacant

HEPPENSTALLS
SOLICITORS

is looking for a

Private Client Solicitor
(2+ Years PQE)

Private Client Solicitor (2+ Years PQE)
Location: New Milton/Hybrid
Job Type: Full-time, Permanent (35 hours per week)
Salary: Competitive, plus benefits

About the Role:
We are seeking a Private Client Solicitor with at least 2 years' post-qualification experience to join our well-established Private Client team. You will manage your own caseload of Wills, Lasting Powers of Attorney (LPAs), and Probate files. Experience with Will Trusts and the Trust Registration Service is highly desirable.

Key Responsibilities:
- Qualified Solicitor with 2+ years PQE in Private Client work
- Experience with Will Trusts and Trust Registration Service (desirable)
- Excellent communication and client care skills
- Strong attention to detail and organisational skills

Benefits:
- Competitive salary
- 32 days holiday (including bank holidays)
- Additional Birthday day off
- Pension scheme
- Networking & community collaboration opportunities
- Opportunities for development/career progression
- A supportive and inclusive working environment
- Discounted legal fees
- Multiple social events

Please email **tracey.dobson@heppenstalls.co.uk** with a copy of your CV and a covering letter. Please also get in touch if you have any questions. ■

Situations Wanted

STUDENT
is looking for
WORK EXPERIENCE

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I am a proactive and dedicated student currently maintaining a 68.3% grade average, with the clear ambition of elevating my final grade to a 1:1. For the past nine months, I have served as a remote compliance Intern within a financial services company, where I developed a keen eye for detail and regulatory frameworks. I am now eager to transition these skills into a purely law-focused environment through work experience at firms across Dorset. While I am primarily seeking opportunities in Dorset, I am fully capable of commuting to firms across Somerset and Wiltshire.

I work effectively within a team and am committed to contributing positively to your firm's daily operations. Specifically, I am looking to refine my legal writing skills to bridge the gap between practical application and academic excellence in my university exams.

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ENQUIRIES OF LOCAL AUTHORITIES AND WATER COMPANIES

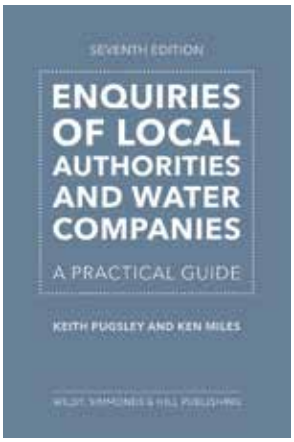
A Practical Guide
7th edition

WILDY, SIMMONDS AND HILL PUBLISHING

By Keith Pugsley and Ken Miles

A COMPREHENSIVE GUIDE FOR PRACTITIONERS IN LOCAL GOVERNMENT INVOLVED IN FORM FILLING

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



In its seventh edition of this well-known work, solicitors Keith Pugsley and Ken Miles provide a clear and concise commentary on Forms CON29 (2016), CON29O (2016), and CON29DW (2021). It is, effectively, a technical legal guide to form filling from Wildy, Simmonds and Hill Publishing but one which has great significance for local government and water companies.

The authors state that an integral part of the modern conveyancing process is the conduct of a search of the register of local land charges maintained by the district council, and the raising of enquiries of local authorities.

And for those new to the system, the register of local land charges contains details of all local land charges registered against property situated in the district administered by the council. This register contains details of such matters as "outstanding liability for road and other financial charges, home improvements grants, tree preservation orders (TPO), and notices served consequent upon the making of a compulsory purchase order (CPO)".

Whilst there is a multitude of local land charges which are registrable by statute or regulation, these charges are not covered by this book. However, searches of the register can be conducted hence the need for completions of forms, normally electronically these days, which for this work covers Con 29 and involve 3 categories: planning, engineering and environmental health.

Each enquiry is examined in turn, and sets out the relevant and up-to-date legal position, with sources and references, in non-technical language. This short book on "Enquiries of Local Authorities and Water Companies" is a popular practical guide written by Pugsley and Miles and remains an invaluable reference to the conveyancing practitioner and the local land charges officer when form filling.

The authors set out a summary of the implications of any reply by the local authority or water company concerned, positive or negative, so that a prospective purchaser can make a balanced decision as to whether to proceed with the purchase. Do read the main introduction, plus the general notes on Forms Con 29, 29O and 29DW, and the notes at the front of the forms for detailed assistance.

It is important to remember that the forms are approved by The Law Society, and various associations representing the interests of the councils replying to the enquiries. Readers will also be aware that these forms are approved by the Local Government Association, the Council of Mortgage Lenders, Water UK, the Association of Council Secretaries and Solicitors, Land Data on behalf of the NLIS, the Council for Licensed Conveyancers and the Local Land Charges Institute. In short, the authors give you brilliant and detailed assistance in form filling with all the usual questions being answered in the 3 Parts of the book. Thank you, Messrs Pugsley and Miles, for making our job so much easier! ■

From precedent libraries to prompts
The next step for legal drafting

Almost every lawyer maintains a Precedent Library, collections of letters, documents, and draft orders that serve as reliable templates for routine legal tasks. Whether housed centrally within a firm or kept individually by lawyers, precedent banks save time, promote consistency, and ensure that essential information is communicated accurately. They prevent lawyers from having to repeatedly craft the same content from scratch.

Yet while precedents are widely used, most lawyers do not yet have something that may soon become equally indispensable: a bank of prompts for automated legal drafting. A prompt is a set of instructions given to artificial intelligence, essentially a command or description designed to generate a specific output such as a document, letter, or analysis. Writing a good prompt is much like instructing a trainee solicitor: the instructions must be clear, unambiguous, and thorough. The more detail the prompt contains, the higher the quality of the result. These prompts often include instructions that might seem obvious, such as avoiding Americanised spellings, but are crucial for consistent outputs.

My recent move from private practice to a role with LEAP, a legal technology company specialising in case management software, has given me a new perspective on both precedents and prompts. As Head of Family Law, I now help shape the software to better support family lawyers. Leaving practice meant leaving behind 18 years' worth of carefully curated precedents; I was hardly going to commit intellectual property theft to take them with me. Instead, I now work closely with LEAP's precedent libraries, which contain a wide range of template letters and documents designed to streamline legal workflows.

In exploring these templates, I have begun adapting and creating precedents that offer enhanced automation. One example is a letter of instruction to an actuary, which not only pulls through key case details but also uses LEAP's Word Add-in to offer dynamic questions. The lawyer indicates, for instance, whether a report is ordered or agreed, and the remainder of the letter changes automatically. This creates a more sophisticated tool than a static template, one that reduces repetitive drafting and accelerates routine tasks.

But this still raises an obvious question: what if technology could answer those questions itself by analysing information within the case file? This is where prompts rather than precedents begin to show their potential.

When I joined LEAP, I had limited experience with AI prompting. My early use of ChatGPT had been purely personal, such as asking it for the correct reading order of John le Carré's George Smiley novels. The idea of drafting complex legal instructions for AI was daunting; it seemed faster simply to type the letters myself. Yet the capability of AI systems to read and interpret case data changes that calculation. In theory, AI could identify pensions, values, dates, or factual circumstances directly from the matter, eliminating the need for manual data entry. A precedent could therefore evolve into a prompt, an automated set of rules that instructs AI on how to assemble the necessary document.

Once created, a prompt could be reused just like a precedent. It could tell the AI to consider the Pensions Advisory Group guidance, relevant Practice Directions, or even the terms of a specific court order. It could dictate formatting, tone, style, and legal framing. After the prompt runs within the secure environment of the case management system, the lawyer would receive a completed draft ready for review.

Another example is the preparation of briefs to counsel. Traditional precedents can pull basic information such as names, dates of birth, or case identifiers. But a prompt could go much further. It could analyse the matter file, summarise the children's arrangements, extract the current issues in dispute, and compile the factual background. This would not replace the lawyer's judgement, but it would provide a first draft similar to the one a trainee might prepare on their first day, only produced in seconds rather than an hour.

Artificial Intelligence is already reshaping legal practice, whether lawyers embrace it or not. The familiar saying captures the trend well: "AI won't replace lawyers, but a lawyer using AI will." Replacing or supplementing precedents with prompts is one way to harness the benefits of AI while preserving the lawyer's expertise, oversight, and control. Just as precedents did not replace lawyers, prompts will not either. Instead, they represent a natural evolution in how we create, structure, and automate legal drafting in an increasingly digital profession.

Katie Phillips
Head of Family Law in LEAP Verticals

Read our White Paper
Artificial Intelligence (AI): Optimising law firm profitability in six simple steps

The Hidden Cost of Standing Still: Why Law Firms Can't Afford "Business as Usual"

In today's legal market, tradition alone won't keep your firm competitive. Many solicitors are unknowingly paying a steep price for clinging to outdated systems—lost time, frustrated staff, and missed opportunities. The truth? "Business as usual" is costing far more than change ever will.

Outdated Systems Drain More Than Just Time
Every hour spent wrestling with clunky software is an hour not spent serving clients or bringing in new business. Across the UK, lawyers still report spending the bulk of their working day on non-billable tasks. The result? Burnt-out teams, dissatisfied clients, and firms falling behind.

Your Staff Deserve Better Tools
The tools you give your people directly impact their job satisfaction. Legacy systems that crash, lag, or make simple processes unnecessarily complex don't just slow things down—they chip away at morale. Cloud-based legal practice management systems, on the other hand, make collaboration seamless, improve wellbeing, and free up lawyers to focus on meaningful work.

The Risk You Can't See: Compliance and Security
If your software hasn't had a major update in years, you're at risk. GDPR compliance, data security, and operational resilience aren't "nice-to-haves"—they're the bare minimum clients expect. Modern solutions like Clio are built with these needs in mind, offering peace of mind alongside performance.

Why Forward-Thinking Firms Are Switching to Clio
For firms in Hampshire, the choice is simple: continue absorbing the hidden costs of outdated technology, or invest in a platform designed for modern legal practice. With Clio, firms gain:

- Efficiency at scale – Automate routine tasks and reclaim billable hours.
- Happier teams – Empower staff with intuitive, reliable software.
- Future-proof security – Stay compliant, safe, and resilient.
- Better client service – Onboard clients quickly and communicate seamlessly.

The Cost of Doing Nothing
Ask yourself: How much is inefficiency already costing your firm? Slower onboarding? Errors creeping in? Time wasted juggling multiple tools?

When you put numbers against these inefficiencies, the real expense becomes clear. And it's usually far greater than the investment in modern software.

The firms thriving today aren't necessarily the biggest, they're the ones willing to adapt. If you're ready to see what smarter systems could mean for your practice, book a quick walkthrough of Clio and see how it can help your firm work smarter, not harder. ■

Sarah Murphy,
General Manager of Clio EMEA

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