

Bournemouth & District Lawyer



Newly Appointed BDLS Officials:
Lauren Day *(Senior Vice President)*
Adrian Falck *(President)*
and Sarah Unsworth *(Junior Vice President)*

INCLUDED IN THIS ISSUE:

- Responding to What AI is Revealing
- Navigating the Regulatory Landscape: Key Compliance Focus Areas
- Why Managers Matter More Than They Think
- Legal Ombudsman: Model Complaints Resolution Procedure



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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:

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

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

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



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COVER INFORMATION

Newly Appointed BDLS Officials: Lauren Day (Senior Vice President), Adrian Falck (President) and Sarah Unsworth (Junior Vice President)

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BDLS DIARY 2026/27

Thur 8 - Sun 11 Oct 2026	BDLS European Conference to Gibraltar
Wed 4 Nov 2026	Newly Qualified/Trainee Drinks Reception at Urban Garden, Bournemouth
Thur 26 Nov 2026	BDLS Christmas Wine Tasting at Marsham Court Hotel, Bournemouth
Wed 10 Feb 2027	BDLS Annual Lunch at The Pavilion, Westover Road, Bournemouth
Fri 23 April 2027	BDLS Annual Dinner at The Highcliff Marriott Hotel, Bournemouth

The President's Column

Adrian Falck



"Are you the President now?" my younger son asked me when I got home after our AGM, but before I could reply my elder son chimed in with "Don't be silly, Daddy isn't orange!"

I pondered over how to start this column; reflecting on those who had gone before me, how my former partners had shaped my training and the honour and privilege I feel to have been elected to serve as President of Bournemouth & District Law Society. As a parent we strive to inspire our children and in a sense as partners/experienced lawyers we look to inspire those we train and mentor to develop as the solicitors/lawyers of tomorrow, but inspiration goes both ways and just as we look to inspire others, my children have inspired me in so many ways, including in opening this newsletter.

My first outing as President took me to Hatfield House at the kind invitation of Michael Scutt, President of Hertfordshire Law Society for their annual dinner and awards. This was a wonderful evening recognising the achievements of their members, in the company of Mark Evans and Lord Salisbury.

My family holiday then took me out of our jurisdiction and into that of my wife and children! While I was away, Lauren (SVP) represented our society at the Cornwall Law Society dinner at Truro Cathedral, Sarah (JVP) represented our society at the Southern Area Association of Local Law Societies meeting on the Isle of Wight and Dan Stanton represented our society at the Isle of Wight Law Society annual dinner at Bembridge Sailing Club (all on the same day)!

Returning to Bournemouth, Mandy Heath, Dan Stanton, Jean Cross and I had the pleasure of joining the High Sheriff of Dorset, Dr Helena Conibear on the Bournemouth leg of her 'Walking the County Lines' to raise awareness of County Lines where drug dealers exploit and devastate the lives of children and vulnerable adults. Naively I had thought this was a 'city' problem, not realising there are currently 16 active drug lines in Dorset, the vast majority of which are in Bournemouth and Poole.

My final event before this newsletter went to press was to attend the Bournemouth & District Junior Lawyers Division Summer Ball at Key West by kind invitation of their President Daisy Kershaw and her committee. This was a lovely evening with a great atmosphere and the fun of the fireworks. Attending this took me back a 'couple' of years to my time as Chair of what was then the Trainee Solicitors Group; certainly an adventure in the law!

Moving on to professional representation, Mark Kiteley hosted our annual Compliance Conference which attracted over 50 attendees and featured an address by Sarah Rapson, Chief Executive of the SRA. Sarah is clearly engaging with the profession and demonstrating her willingness to listen and adopt a different approach to that of her predecessor. Following the conference Mark and I have directly engaged with Sarah on the proposed changes to who may act as a COLP and COFA; the discussion is ongoing...

Monday 2 November marks the start of the national Pro Bono Week. Many members and firms carry out hours of pro bono advice and representation each year, which is greatly appreciated by our communities and is in much need with the ever decline of the provision of Legal Aid. However, as lawyers, we are not good at taking recognition for what we do. There is now published a national ProBono recognition list (<https://www.probonorecognitionlist.org.uk/>) recognising those Solicitors, Barristers and Legal Executives who have 'logged' 25 or more hours of ProBono work in a year - according to that list there are only two lawyers in Bournemouth who have done so. If you are giving your time and undertaking ProBono work I would urge you to claim the recognition you rightly deserve.

Looking ahead, on the topic of AI in the law, Mandy has been busy arranging our Microsoft Copilot 'Essentials for Everyday Work' course. A lot of us have Copilot on our desktops, for some it is just another icon to be ignored and for others it is a click to a world of possibilities. Our aim in hosting this course is to discover how Copilot can help us in our daily practice and how we can make use of it practically. Following on the AI theme, Mandy and I have been liaising with Lexis Nexis and Thomson Reuters and hope to bring forward an event later in my year to delve into their AI offerings and discover how to get the best out of what are often expensive and under used tools.

Our European Conference to Gibraltar is fast approaching for which our conference organiser Dan Stanton has issued the Itinerary this week. The itinerary is truly action packed (well as action packed as it can be for a conference with a legal theme and a relatively small destination!) On behalf of all attending, Dan, thank you, this certainly looks to be a great few days. The conference is an opportunity to explore other European jurisdictions, meeting their members of the profession in the company of our fellow society members. This year will feature a visit to the Gibraltar Parliament hosted by the Speaker of the Gibraltar Parliament, to the Courts of Gibraltar hosted by the Hon Mr Justice Dudley, Chief Justice of Gibraltar and to the Rock of Gibraltar hosted by the Barbary macaques!

Other upcoming events organised by our society include the theatre trip to Moulin Rouge at the Mayflower in Southampton on 22 October, our annual Trainee and Newly Qualified Lawyers drinks reception at Urban Garden, Bournemouth on Wednesday 4 November, our Act of Remembrance at Bournemouth Court on Wednesday 11 November and our Christmas wine tasting evening at the Marsham Court Hotel, Bournemouth on 26 November.

In finishing, I will endeavour to adopt brevity for future columns (!), but would like to thank Mandy, our Society Manager for all that she has done and continues to do for our Society. On 1 October Mandy hits her 25 year anniversary with BDLS; Mandy you are fundamental to the smooth running of our society, its events and reputation - thank you! ■

Adrian Falck
BDLS President



County Lines awareness: Adrian Falck, Cameron Hill, Jean Cross, The High Sheriff of Dorset: Helena Conibear, Detective Chief Inspector of Dorset Police: Jamie Halford, Mandy Heath

BDLS Annual General Meeting

at the Captains Club Hotel, Christchurch - Monday 15 June 2026



Sarah Unsworth, Lauren Day, Adrian Falck, Mandy Heath, Conor Maher and Ana Dilling

The Bournemouth & District Law Society Annual General Meeting was held this year at the stunning Captains Club Hotel in Christchurch. Guests gathered ahead of the formal proceedings, taking the opportunity to network and catch up with colleagues in a relaxed and welcoming setting.

This year's speaker was Jonny Bush of Enhanced, who delivered an engaging and highly practical session on how legal professionals can work more effectively with Microsoft Copilot across Office applications. His demonstration showcased how Copilot can be integrated into Word, PowerPoint, Excel and Outlook, helping users streamline everyday tasks, improve productivity and unlock new efficiencies.

Jonny highlighted a number of exciting new features, illustrating how AI can assist with drafting documents, summarising complex information, analysing data, and managing communications more effectively. His presentation provided valuable insight into how emerging technology can support the evolving needs of modern legal practice.

Nick Gallagher, CEO of The Solicitors' Charity, also addressed attendees, sharing an overview of the Charity's impactful work supporting members of the legal profession. He highlighted the wide range of assistance available, from financial support to wellbeing services, and encouraged firms and individuals to engage with the Charity's initiatives and consider how they can contribute to supporting colleagues across the profession.

For further details, visit: www.thesolicitorscharity.org

BDLS Annual General Meeting

at the Captains Club Hotel, Christchurch - Monday 15 June 2026

General Committee Appointments 2026/2027

The AGM then formally commenced, with the following appointments confirmed:

- **President:** Adrian Falck, Preston Redman
- **Senior Vice President:** Lauren Day, Ellis Jones
- **Junior Vice President:** Sarah Unsworth, Scott Bailey
- **Honorary Secretary:** Ana Dilling, Rawlins Davy Reeves
- **Honorary Treasurer:** Conor Maher, Ellis Jones
- **Assistant Honorary Secretary:** Emily Green, Trethowans

The following were also appointed as General Committee Members, each serving a three-year term:

- Cameron Hill, Blanchards Bailey
- Inga Pope, Coles Miller

We wish them all every success in their roles and look forward to their contributions over the coming year.

Presidential Remarks

In his inaugural address, newly appointed President, Adrian Falck, expressed his commitment to building upon the excellent work undertaken by Mark Proctor during his year. He outlined his intention to engage with The Law Society and the Solicitors Regulation Authority in representing our members, and to explore, alongside the membership, the safe and secure use of AI to enhance legal practice and the delivery of services for the profession of today and tomorrow.

Above all, he emphasised the importance of upholding the honour and integrity of the profession and promoting the benefits to our clients - 'consumers of legal services' - of engaging a professionally qualified and regulated solicitor.

We wish him every success for the year ahead and look forward to supporting him during his presidency. ■

MANDY HEATH
BDLS Society Manager



Cameron Hill and Inga Pope



Dan Francis, Kelly Payne, Victoria Hewitt and Mark Lello



Michael Newbold and Conor Maher

BDLS Annual General Meeting

at the Captains Club Hotel, Christchurch - Monday 15 June 2026



Emma King, Julian Heath and David McWilliam



Fiona Knight, Byron Sims and Jean Cross



Anne Watson-Lee, Mark Proctor and Sandra Graham



George Crofts, Adrian Randall and Dan Stanton



Mo Aldridge and Nick Gallagher



Andrew Carswell and Adrian Harding

BDLS

TRAINEE & NEWLY QUALIFIED LAWYERS DRINKS RECEPTION

Wednesday 4 November 2026 17:30 – 19:30
Urban Garden, Exeter Crescent, Bournemouth



Trainee & Newly Qualified Drinks Reception 2025 at the Marsham Court Hotel, bringing together the next generation of legal professionals for an evening of networking and celebration. L:R Amy Dashwood, Abbie Audrain, Abba Atkin, Charlie Turner, Hannah Collins and Becky Hobell

Bournemouth & District Law Society (BDLS), in collaboration with Bournemouth & District Junior Lawyers Division (BDJLD), is delighted to host this drinks reception for the next generation of legal professionals. This event is open to:

- Trainee solicitors
- Solicitor apprentices and those studying for the SQE
- Trainee CILEX members
- Solicitors/CILEX qualified within the past 12 months

Join us for an opportunity to learn about BDLS and BDJLD's activities, connect with peers, share experiences and build your professional network in a friendly and informal setting.

Invitations will be sent out shortly – we look forward to seeing you there! In the meantime, save the date.

Kindly sponsored by Chadwick Nott and 3PB. ■

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BARRISTERS

BDLS CHRISTMAS WINE TASTING

Thursday 26 November 2026 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 perfect for the Christmas season. For the fantastic price of £25, the evening will include a tasting of six wines, including champagne, and a cheeseboard.

Whether you are a seasoned enthusiast or simply enjoy a good glass of wine, all levels are warmly welcome! Join us for an evening filled with good wine and great company.

Limited tickets available so book your tickets early! Book your places here: <https://www.bournemouthlaw.com/events>

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BARRISTERS

BDLS Annual Lunch

Wednesday 10 February 2027

The Pavilion Ballroom, Westover Road, Bournemouth



Guest Speaker
Nigel Havers

We are delighted to announce that the Bournemouth & District Law Society Annual Lunch will take place on Wednesday 10 February 2027, when we will be welcoming the renowned actor, presenter and raconteur **Nigel Havers** as our guest speaker. With a distinguished career spanning television, film and theatre, Nigel is widely known for his appearances in *Chariots of Fire*, *Don't Wait Up*, *The Charmer*, *Coronation Street* and numerous West End productions. An entertaining and engaging speaker, Nigel is sure to provide plenty of amusing stories and insights from a lifetime in the spotlight.

Full details and booking information will be released shortly. With almost 600 tickets sold within a very short period for last year's lunch, we recommend booking as soon as reservations open to avoid disappointment. We anticipate another sell-out event and look forward to welcoming you for what promises to be a memorable afternoon. ■

Kindly sponsored by:



BDLS Annual Dinner

Friday 23 April 2027

Highcliff Marriot Hotel, Bournemouth



Guest Speaker

HHJ Jonathan Fuller KC

His Honour Judge Jonathan Fuller KC – a Circuit Judge who has served since 2014, primarily presiding over criminal cases at courts including Bournemouth Crown Court.

Judge Fuller will reflect on a career that has taken him from a 16-year-old school leaver to a respected judge, enjoying a remarkable and rewarding journey through the law.. ■

This year we will also be enjoying live music from SoulStar, a five-piece band featuring saxophone, playing a fantastic selection of songs through the ages.

Please SAVE THE DATE! Final details will be emailed to members later this year. ■



SoulStar

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**BOURNEMOUTH & DISTRICT
JUNIOR LAWYERS DIVISION**



Bournemouth & District Junior Lawyers Division



It has been another busy few months for the BDJLD, with a range of events giving our members the opportunity to get together, try something different, and enjoy some well deserved time out of the office.

We recently hosted a self-defence event, led by Leanne Lolley of On Point Data. Leanne kindly shared her expertise with members, drawing on her experience as a Taekwondo black belt to deliver a session that was both practical and informative. The event was a great success, with everyone getting involved and plenty of laughs along the way. It was also an opportunity to raise funds for our Charity of the Year, In Jolly Good Company.

Our Summer Ball at Key West on Bournemouth Pier was a particular highlight. We were delighted to welcome members and colleagues from across the local legal community for an evening of live music, a summer BBQ, drinks and our charity raffle. With the sun setting over Bournemouth beach and the fireworks taking place during the evening, it was a fantastic setting for what proved to be a really memorable night.

We were delighted to raise £710 through the evening's raffle for In Jolly Good Company. The funds will go towards their weekly Jolly Friendly Winter Lunch Delivery service, run in partnership with the Friendly Food Club. The service provides delicious, home-cooked meals free of charge to older people who are particularly rurally isolated, too unwell to travel, or lack the transport needed to attend a Jolly Day.

The service provides much more than a meal. Their "very special dinner lady, Kate" always makes sure she has time for a chat with those she visits, helping to provide valuable company and a friendly face as well as a hot, nutritious lunch. £700 provides 70 lunches, so we are incredibly grateful to everyone who bought raffle tickets and to the local firms and businesses who generously donated prizes.

Looking ahead, our next event will be a friendly padel tournament on 17 September, followed by pizza and an opportunity to network. After enjoying padel together as a committee, we're looking forward to bringing the wider JLD community together for some friendly competition and a chance to try something a little different. Tickets will be released shortly, so keep an eye on our social media for further details.

As always, we are hugely grateful for the continued enthusiasm and support of our members. We look forward to bringing everyone together for more events, fundraising, and time to connect over the rest of the year. ■

Daisy Kershaw

President for the BDJLD

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



Preston Redman: Georgia Hems, Amy Edgson, Jshan Kumar, Charlotte Dawson, Brandon Gillard-Bunting and Justine Chapman-Casey



3PB: Jessica Fassoli, Lucy Bill and Ellie Dawkins



BDJLD President, Daisy Kershaw, with main sponsors, On Point Data



Ellis Jones: Julia Walecka, Dimitar Boganov, Alex Chance, Jenny Sanderson, Tomas Baker, Evie Allum, Lucy Barr and Tom Eyles



BDJLD members put their self-defence skills to the test under the guidance of Taekwondo black belt, Leanne Lolley of On Point Data



RESPONDING TO WHAT AI IS REVEALING

In Part 1 of this piece published in the Bournemouth Lawyer Summer Edition, I suggested that the real lesson from recent AI-related developments lies not in the technology itself, but in what it reveals. It reveals how legal work is actually done, where control genuinely sits, and how responsibility continues to attach to individuals even as processes become more distributed. The purpose of this second part is to take that understanding and move it forward. Once we accept that AI is exposing underlying features of the profession - rather than simply introducing new risks - the question becomes how we respond in a way that strengthens, rather than strains, the way legal services are delivered.

Understanding before adoption

One of the defining characteristics of the current moment is the level of expectation attached to AI. Clients are asking what firms are doing. Leadership teams are seeking progress. Competitors are experimenting, sometimes visibly and sometimes quietly. In that environment, there is a natural tendency to prioritise action. To adopt tools, to run pilots, to demonstrate momentum. But activity is not the same as progress.

Many organisations are busy with AI. Far fewer are progressing with it.

What became clear during the session in Bournemouth is that the most important step is not adoption, but understanding. Without a clear sense of what these systems are doing, where they add value, and where they introduce risk, it is very difficult to use them in a way that is either effective or safe. You cannot meaningfully oversee a system you do not understand. And you cannot exercise professional judgment if your role within that system is reduced to reviewing outputs without the time, context or authority to interrogate them. **AI is not a tool you install. It is a capability you build.**

Asking better questions

Much of the discussion around AI in law remains focused on the surface layer. Questions about which tools to use, which models perform best, or which vendors are leading the market tend to dominate - but this is not a technical arms race between models. It is not a choice between Jude Law and Harvey Specter, despite what some of the current marketing campaigns might suggest. The profession's future will not be determined by which actor fronts a platform, but by how well firms understand and apply the technology in practice. The idea that the profession's future turns on which model you select is both comforting and deeply misleading.

The firms that succeed will not be those that pick the "best" model. They will be those that understand their own work best.

Because the more meaningful questions are rarely about the technology itself. They are about where time is spent, where value is created, and where risk accumulates within legal workflows.

What emerged clearly when I presented to BDLS members was that the most valuable insights do not come from abstract discussions about technology. They come from practitioners reflecting on their own work, identifying points of friction, and thinking carefully about how those might be addressed.

The best AI use cases are not invented in innovation teams - they are discovered in practice.

From exploration to capability

Many organisations are now in an exploratory phase. There is experimentation, there are pilots, and there is a growing awareness of the potential. However there is also, quite often, a sense of frustration. Tools are introduced but not widely adopted. Promises are made but not fully realised. The gap between expectation and delivery becomes increasingly apparent.



Everyone wants AI. Very few want to do the work required to make their data usable.

Bridging that gap requires more than further experimentation. It requires capability.

That means developing a structured approach: understanding where AI fits, validating specific use cases, and ensuring that what is implemented is aligned with how people actually work.

Build, buy, or rethink the question

A common debate within the profession is whether firms should build AI solutions or buy them from vendors. In practice, the answer depends less on the technology itself and more on the organisation's level of maturity. If there is no clear understanding of where AI fits, buying a platform will not resolve that uncertainty. Equally, building without that clarity risks creating something that is technically sound but practically underused. Where firms have been most successful, they have started with a clearly defined problem. They have identified a specific task or process that can be improved, and then designed a solution - whether built or bought - that addresses the need directly. In that sense, the debate is not really about build versus buy. It is about readiness.

A profession leaning in

What I saw in Bournemouth was encouraging. A group of lawyers not dismissing AI, not overestimating it, but engaging with it seriously. Testing it. Challenging it. Thinking through its implications for their own practice. That mindset is likely to be decisive because the real question facing the profession is not whether AI will be used. It already is. The question is whether it will be used in a way that strengthens legal practice - enhancing judgment, improving efficiency and supporting better outcomes - or in a way that exposes underlying weaknesses in how work is structured and supervised. The answer to that question

will not be determined by the technology alone. It will be determined by how seriously the profession engages with it. If you recognise that these are conversations your firm really ought to be having, the next step is to approach them with clarity and structure. For small and mid-sized firms, there is a real opportunity to get ahead here. Please do get in touch to continue the conversation. ■

Akber Dattoo

Professor of Law & Technology, University of Surrey
Co-Chair, Technology & Law Committee, The Law Society of England and Wales
Founder & CEO, D2 Legal Technology (D2LT)
akber@d2legaltech.com



Dorset Historic Churches Trust (DHCT)



DHCT is a Dorset volunteer run charity that makes grants to help repair and maintain historic churches in Dorset. It is a secular organisation and raises about £150,000 a year - about two thirds from its annual county wide fund-raising event 'Ride + Stride', about a third from legacies, and some from other activities.

We have not historically promoted legacies so when they are received it is a welcome surprise. However, the cost of repairs keeps rising inexorably, exacerbated by the abolition of the Listed Places of Worship Scheme which means churches need to raise another 20% to cover the VAT on building works. So we are keen to build up our income from legacies over the years.

We have been contacting Dorset firms of solicitors with the message that, if a client is making or amending a will, and is looking for suggestions for any charitable legacies, they might consider a local charity committed to preserving a crucial part of Dorset's built heritage. We have a small pamphlet which describes our activities in more detail. This message seems to be well received, accepting that it may only be a minority of clients for whom it is of interest.

If you would consider helping us spread this message, please email me, Tom Sweet-Escott, at legacies@mail.dhct.org.uk ■



NAVIGATING THE REGULATORY LANDSCAPE: KEY COMPLIANCE FOCUS AREAS

The first half of 2026 certainly kept Compliance Managers, COLPs and MLROs busy. Amendments to the Money Laundering Regulations, changes to how you must handle data protection complaints, data collection exercises, tax advisor registration, consultations – there has barely been time to catch your breath. This is what I'm hearing and seeing sector wide, no matter the size or resource of the firm.

For many firms, compliance feels like a game of whack-a-mole right now. Fight the fire that's biggest and closest to where you are. And I get it. I really do. I'm seeing exposure hangover in relation to recent changes that haven't effectively made it to the coalface as well as horizon scanning becoming an unhelpful distraction to the here and now. I've set out below some focus areas, but also some ideas as to what to do next to free up time and resource to focus where your risk is greatest. The list could probably be endless – but let's pick 5 focus areas:

1. AML and Economic Crime – it's everyone's top talking about. Don't get distracted by fear of the regulator or fines. That is the wrong driver. Ask yourself what you're really not comfortable with. Often it is a lack of confidence that your systems, processes and staff are all doing what they should be – every amendment and addition is a bolt on to an "old" policy or process. You don't have time to stop and think about whether your controls are effective. A review of file audit data and an independent Regulation 21 audit should tell you what shape you're in and give you some areas to focus on.
2. Ethics is a topic which has dropped off the radar for far too many firms. If you think that headline grabbing case wouldn't happen at your firm – think again. The conditions in the legal sector mean ethical banana skins are rife, so it's not surprising that staff working under pressure misstep. When did you last train on ethics? If that wasn't in the last 12-18 months that should make you uncomfortable.
3. AI generated complaints are on the rise. Whilst there is little you can do about that, you can change your approach to dealing with them. Your policy and process was not designed for this volume or the length of complaint. What used to work for you once upon a time in all likelihood won't any more so redesign your complaints policy accordingly. Couple this with the Model Complaints Resolution Procedure released by The Legal Ombudsman in July which is voluntary but should be considered carefully by all firms – now is the time to revisit how you handle complaints.
4. Third party litigation funding – whilst this won't be relevant to all firms, those that it is should ensure they engage with the current consultation which closes on 17 September. High volume consumer claims will continue to be a focus area for the regulator and having your say is crucial.

5. Efficiency has never been more important. Assess your tech offering – what do you have, what is it being used for, what does it cost. I repeatedly see firms doubling up on tech costs or not utilising what they already have and going out and purchasing more. I'd do this before you get sucked into what AI tool is going to swoop in and revolutionise your business. Go back to basics and sure up your foundations.

But there are some ways to ensure a shifting landscape gets managed without becoming a complete time and resource vacuum:

- Put in place a training calendar (could be calendar year, PII year or financial year) – plot out all the training your different teams need. AML, ethics, GDPR, conflicts, Accounts Rules etc. Be clear as to the learning objectives (these will vary depending on team, role and seniority). Be inventive as to delivery methods – training is not just death by PowerPoint. Spread it out over the year (avoid August and December) and get it in the diaries, book external suppliers to deliver or arrange group webinar bookings, think about how you are going to audit the effectiveness of training. There will be extra things to slot in throughout the year, but your core will be taken care of and that's one big tick off your to do list.
- Focus on your data – specifically in relation to AML but not exclusively. Data is gold. What do you currently capture and how? What would you like to capture? Forget the "how" (sorry IT teams!) – make a wish list. What data do you want and why would it be helpful to the business (remember risk isn't about the risk team, it is about the whole firm).
- Be clear about where you are in terms of AML and where you want to get to. Not where you think you should be. Be uncomfortably honest so you can make a realistic plan. Are you proactive or reactive? What are your struggles. Where is your business heading – growth, consolidation, PE investment? All of this changes your risk appetite and priorities.

Need help with planning ahead? That's what I do, as external eyes. I'm not in the weeds of your firm so I offer a unique perspective as to what you need most and where to focus.

To learn more about what's been keeping the regulator business, and what's on the radar for the rest of 2026 and 2027, sign up for the **FREE BDLS webinar: The Regulatory Landscape – recent SRA Findings and What Transition to FCA Regulation Might Look Like on Monday 5 October 2026 11:00 – 12:00** Book your places here: <https://www.bournemouthlaw.com/bournemouth-district-law-society-lectures> ■

Eloise Butterworth
Independent Compliance Consultant

BDLS Lecture Programme 2026-2027

KEY:

LIVE WEBINARS

FACE TO FACE LECTURES



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Important Notice – Change to BDLS Webinar Platform

Bournemouth & District Law Society is pleased to announce that, from 1 September 2026, we will be moving our webinar platform from Zoom to Microsoft Teams.

This change will provide a more streamlined and secure experience for our members and guests. All future webinar joining instructions will be sent via email as usual, with Microsoft Teams links replacing Zoom links.

You do not need a paid Microsoft Teams account to attend our webinars. Simply click the link provided in your booking confirmation to join via the Teams app or through your web browser.

We look forward to welcoming you to our webinars on Microsoft Teams and thank you for your continued support. If you have any questions, please contact the BDLS office – office@bournemouthlaw.com

DATE AND TIME	LECTURE	FORMAT	LECTURER	VENUE
2026				
8 September 2026 11:00 – 11:30	The Story Behind the Numbers: How to read and understand the different types of accounts	Live Webinar	Lucy Filer, TC Group	Teams
9 and 10 September 2026 09:30 – 17:00	Residential Conveyancing for Support Staff	Face to Face	Ian Quayle	Marsham Court Hotel
1 October 2026 09:00 – 16:45	Private Client Conference	Face to Face	Various	Queens Hotel
5 October 2026 11:00- 12:00	The regulatory landscape – recent findings from SRA inspections and what the transition to FCA regulation will look and feel like	Live Webinar	Eloise Butterworth	Teams
6 October 2026 13:30 – 16:45	Conveyancing Law Update	Face to Face	Richard Snape	Queens Hotel
13 October 2026 11:00- 12:00	Leading With Focus: Managing Overwhelm, Time & Your Team Effectively	Live Webinar	Jess Wiggins	Teams
20 October 2026 09:30 – 12:30	Co-Pilot Essentials for Everyday Work	Face to Face	Adapt	Marsham Court Hotel
20 October 2026 13:30 – 16:30	Co-Pilot Essentials for Everyday Work	Face to Face	Adapt	Marsham Court Hotel
THE FOLLOWING EVENTS ARE CURRENTLY BEING ORGANISED AND WILL BE ADVERTISED TO MEMBERS SOON:				
12 November 2026 09:30 – 12:45	Topic to be confirmed	Face to Face	Helen Foster	Marsham Court Hotel
12 November 2026 14:00 – 17:15	Topic to be confirmed	Face to Face	Helen Foster	Marsham Court Hotel

BDLS Lecture Programme 2026-2027 (cont.)

DATE AND TIME	LECTURE	FORMAT	LECTURER	VENUE
19 November 2026 14:00 – 17:15	Annual Civil Litigation Review	Face to Face	Andrew McLoughlin	Queens Hotel
25 November 2026 TBC	Property Law Conference	Face to Face	Various	Queens Hotel
2 December 2026 14:30-16:30	Topic to be confirmed	Face to Face	Andrew Allen, PKF Francis Clark	Queens Hotel
2027				
13. January 2027 11:00 – 12:00	Boundary Disputes: A Practical Approach	Live Webinar	Hannah Mackinlay	Teams
26 January 2027 14:00 – 17:15	Topic to be confirmed	Face to Face	Tracy Thompson	Queens Hotel
4 February 2027 13:30 – 16:45	Topic to be confirmed	Face to Face	Jay Sahota	Marsham Court Hotel
24 February 2027 10:30 – 11:30	Auction Conveyancing – The Key Risks	Live Webinar	Lorraine Richardson	Teams
16 March 2027 13:30 – 16:45	Residential SDLT – Overview Update & Case Studies	Face to Face	Amanda Perrotton	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.

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 2026

WEBINAR Tuesday 8 September 2026 – 11:00 – 11:30

Topic	THE STORY BEHIND THE NUMBERS: HOW TO READ AND UNDERSTAND THE DIFFERENT TYPES OF ACCOUNTS
Lecturer	Lucy Filer, TC Group
Cost	£0 – Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices) £10 – Non Member of BDLS

■ Financial statements can reveal far more than simply whether a business is making a profit. This practical and informal session will provide a top-level guide to understanding different types of accounts, identifying potential red flags, and knowing when to ask further questions. The session will cover:

- Understanding the differences between statutory, filleted, management, LLP and sole trader accounts.
- The key figures and disclosures that can tell you the most about a business – both clients and your own.
- How to spot warning signs and inconsistencies in financial statements.
- Common areas where figures may have been manipulated or presented more favourably.
- What changes in the numbers may be telling you.
- Upcoming changes to Companies House filing requirements.
- The impact of the new lease accounting rules and why balance sheets may start to look very different.

Takeaway: Practical tips to help you read accounts with confidence and ask the right questions when the numbers don't quite add up.



Lucy Filer, TC Group

LECTURE Wednesday 9 September and Thursday 10 September 2026 – 09:30 – 17:00

Topic	RESIDENTIAL CONVEYANCING FOR SUPPORT STAFF (2 day course)
Lecturer	Ian Quayle
Venue	Marsham Court Hotel, Bournemouth
Cost	£260 – Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices) £260 – Non Member of BDLS

■ This two day course is designed for paralegals, conveyancing support staff, secretarial staff and qualified lawyers wanting to retrain in residential conveyancing and anyone engaged in the residential conveyancing process who needs or desires an insight into the mechanics and legal principles involved in modern residential conveyancing.

DAY 1

- Getting started - Taking instructions, Money laundering, Dealing with residential clients.
- Acting for the Seller - Obtaining and checking the title, dealing with the TA forms and drafting the contract, preparing the contract bundle.
- Acting for the Buyer - Checking the contract bundle, searches, enquiries, client inspection, and acting for lenders.
- Exchanging Contracts - Preparing for Exchange, the mechanics of exchange, protecting the contract.
- Preparing for Completion - Acting for the seller - completing TA13, approving the transfer, preparing completion statements, dealing with notices and restrictions. Acting for the buyer – drafting the transfer, pre-completion searches, dealing with the lender, preparation of completion statements and advising the client.
- Completion and completion day problems - The Law Society Code for completion by post, dealing with undertakings, practical issues including the transmission of funds, advising clients and what to do if things go wrong – notices to complete, rescission and other steps.

DAY 2

- Post Completion - Acting for the seller – discharging charges, compliance with undertakings. Acting for the buyer – SDLT returns, registration of dispositions.
- Land Registration Issues - Boundaries, notices, restrictions, adverse possession, and problem areas.
- Residential leases 1 - An overview of leasehold transactions.
- Residential Leases 2 - Leasehold enquiries, service charge issues, key clauses in residential leases.
- Drafting Residential Conveyancing Documentation - Drafting contracts, transfers and leases.
- Avoiding Negligence Claims - Tips and traps for the unwary.



Ian Quayle

Summary of Upcoming Lectures and Webinars 2026

LECTURE Thursday 1 October 2026 – 09:00 – 16:45

Topic	PRIVATE CLIENT CONFERENCE
Lecturer	Various
Venue	Queens Hotel, Bournemouth
Cost	£140 – Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices) £185 – Non Member of BDLS (To include lunch and refreshments)

■ We have an exciting line up of speakers including:

- **A-Z OF DISCRETIONARY TRUSTS** *Rebecca Roscoe*
- **DECLARATIONS OF TRUST: A FORGOTTEN HERO** *Rebecca Roscoe*
- **MANAGING UNCERTAINTY IN ESTATE ADMINISTRATION BY MITIGATING RISK WITH EXCEPTIONAL RESEARCH AND SO MUCH MORE** *Alan Taylor, Finders International*
- **AN INSIGHT INTO THE CURRENT AFFAIRS OF THE FUNERAL INDUSTRY** *Robert Head, Head and Wheble*
- **LATER LIFE FINANCE: SUPPORTING BETTER OUTCOMES FOR RETIREMENT AND ESTATE PLANNING** *Matthew Fleming-Duffy*
- **WILLS AND DEEDS OF VARIATION TO MITIGATE IHT WITH THE NEW APR/BPR 100% ALLOWANCE** *John Bunker*
- **PENSIONS: PLANNING FOR PROBATE PRACTICE AFTER THE NEW IHT CHARGE - STEPS NEEDED BEFORE APRIL 2027** *John Bunker*

Full details and timings here: [1.10.26 Private Client Conference flyer1.pdf](#)

WEBINAR Monday 5 October 2026 – 11:00 – 12:00

Topic	THE REGULATORY LANDSCAPE – RECENT FINDINGS FROM SRA INSPECTIONS AND WHAT THE TRANSITION TO FCA REGULATION WILL LOOK AND FEEL LIKE
Lecturer	Eloise Butterworth
Cost	£0 – Member and Associate Members of BDLS/Trainees (Solicitors; Cilex; Apprentices) £10 – Non Member of BDLS

■ This webinar will look at:

- What's going on from a non-AML perspective
 - Rebukes, fines and SDT decisions
 - Continuing competency and ethics – what the recent consultation is telling us in terms of the direction of travel
 - Role holders – the future for COLPs and COFAs
 - Complaints - data collection, Model Complaints Resolution Procedure & the role of AI
- AML – where we are and where we're heading
 - Keeping the current regulator happy
 - What I'm seeing firms struggle with on the ground
 - Getting ready for the FCA – what we know, what we don't know and what we suspect
 - Practical things to be cracking on with now
- Questions – ask me anything!



Eloise Butterworth

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 for Solicitors

Associate Membership for all legal professionals who are "authorised persons" under the Legal Services Act 2007, as well as a person authorised by the SRA to have a compliance role (ie COLP, COFA).

Public Sector Membership free for legal professionals employed by public bodies (Local Authorities, HMCTS, CPS, Dorset Police, etc.) Note: Event/course fees apply at non-member rates; public sector members are not listed in the BDLS Solicitor Search.

Categories	Annual Fee
Standard Membership	£95
Associate Membership	£70
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.

The Council Member's Report

PETER WATSON-LEE

Law Society Council Member for Dorset



SRA – SIGNS OF PROGRESS

The new Chief Executive of the SRA, Sarah Rapson, has certainly made her presence felt. In recent weeks she has spoken at the Law Society Council where she faced an impressive 104 submitted questions – spoke to us at the 'Town Hall' meeting with local Law Societies, and even attended our own BDLS Compliance Conference.

Her arrival has brought a noticeable change in tone. She has openly acknowledged that the regulator's relationship with the profession has gone badly off course, even remarking that she has never encountered a regulator so widely disliked by those it oversees. Her proposed remedy is a complete reset: a shift in culture and a more constructive, supportive approach to engagement.

Key to this reset is earlier, more proactive risk management and a renewed focus on core regulatory responsibilities. One early sign is the decision to abandon the previous proposal for the SRA to take over the regulation of CILEX, which idea is now firmly shelved.

SRA – THE LESS WELCOME NEWS

Improvement, however, comes at a price. The SRA is seeking a substantial 29% increase in the practising certificate fee, raising the individual contribution from £190 to £240. They attribute this to rising costs in core regulatory functions, the need to modernise and an increase in interventions.

Alongside this, the compensation fund levy is also rising sharply due to a surge in large firm frauds. A late change in approach means the levy split between individuals and firms will shift from 50/50 to 70/30. Individuals will now pay £170, and firms £2,170. Firms with fewer than 29 solicitors will see a slight reduction compared with the previous model, but the overall increase remains significant.

SRA – WHAT'S CHANGING

Further regulatory tightening is already emerging. Requirements around accountants' reports are being strengthened, and the SRA is looking to enforce clearer separation between firm owners and compliance officers (COLPs and COFAs). While this may be manageable for large practices, it poses real challenges for small and medium sized firms. This point was made strongly and directly to Sarah Rapson at the BDLS Compliance Conference and she has acknowledged that it will be looked at.

SOLICITORS QUALIFYING EXAMINATION (SQE)

Concerns about the SQE continue to be raised by Law Society Council members. No one expects qualification to be easy, but many members have shared troubling accounts of exams being unnecessarily difficult or poorly administered. At our request, Kaplan (the organisation responsible for delivering the SQE) attended Council to answer detailed questions, including surprisingly basic issues such as the refusal to allow candidates to bring water into the exam halls.

LEGAL HEROES

The Legal Hero Awards return this year following a pause for the Bicentenary celebrations. The 2026 Legal Heroes will be announced on 24 September at Chancery Lane.

These awards celebrate solicitors who have made an exceptional difference to individuals, communities and society, often unsung and without recognition. This year saw a record 84 nominations, now narrowed down to a shortlist of 21. Those shortlisted will attend the ceremony, where the top six will be named as the 2026 Legal Heroes.

The awards highlight the many ways solicitors contribute to the public good far beyond their day to day work.

CONSULTATIONS EVERYWHERE

The flow of consultations shows no sign of slowing. One of the latest, of particular interest to family practitioners, is the government's paper *A Fairer End to Relationships*. Proposals include codifying financial arrangements on divorce, recognising domestic abuse as a relevant factor (though how this would operate in practice remains unclear), making pre nups binding where legal advice has been taken, and, more controversially, granting cohabitants rights to claim when their relationships end. ■

Peter Watson-Lee

Law Society Council Member for Dorset



Not all hard work and no play. Law Society Council members enjoy a soiree at the National Liberal Club in London after a full day's Council meeting in Chancery Lane

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
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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 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



WHY MANAGERS MATTER MORE THAN THEY THINK

Managers can make a huge difference to how people feel about working in law, often without realising it. Usually, it's not one big thing that affects someone's wellbeing at work. It's the small everyday things. Whether someone checks in properly. Whether people feel trusted and supported. Whether anyone notices when someone is struggling. Whether people feel able to switch off at the end of the day without worrying about how it will look.

LawCare's new guide, 10 ways to be a better manager, was shaped by the experiences people shared in the Life in the Law 2025 research about what helps at work, and what makes working life harder. Behind the practical tips is a bigger point: managers help shape people's day-to-day experience of work.

Small actions add up

One thing that came through clearly in the research is that people often want very ordinary things from managers. To be noticed. To be asked how they are. To be treated like someone with a life outside work. One person who took part in Life in the Law 2025 said they wanted to:

"Chat more about non work matters. They know nothing about me and my life even though I have been there 6 years, they are not interested. I don't expect full on friendship, but some interest in me as a person as opposed to a worker would be welcome."

It's a reminder that people often remember the small things most. A manager checking in after a difficult meeting. Someone noticing they seem overwhelmed. A quick thank you after a hard week. None of it is complicated, but it can make work feel less lonely and help people feel more supported.

Managers set the tone

The way managers behave has a big impact on the working environment. If someone senior is sending emails late at night, never properly switching off on annual leave or replying instantly at all hours, people notice. Nobody needs to say anything directly for the message to land. That is how habits spread. People start to feel they should always be available too. Managers can help by paying attention to the signals they are sending. That might mean avoiding unnecessary messages outside working hours, encouraging people to take breaks, or saying clearly that nobody is expected to reply in the evening.

Managers are under pressure too

It's also important to remember that many managers are under pressure themselves. In the legal sector, people are often promoted because they are good lawyers, but that does not automatically mean they have the skills, time or support to manage people well. Managing people properly takes time. So does checking in with someone, supporting workloads, handling difficult conversations and creating a healthy team culture. But many managers are expected to learn all of this as they go, alongside demanding jobs of their own. As one person in the Life in the Law 2025 research put it:

"People management is a special skill... It does not follow that because someone is a good lawyer, they are a good manager."

Life in the Law 2025 found that only 54.6% of those with managerial responsibilities had received training to support them in managing people. Less than a third (31.3%) said their targets or billable hours were adjusted to reflect the time needed to manage others or undertake training.

If firms want healthier workplaces, people management needs to be treated as an important skill, with proper training, support and time to do it well.

Creating space for honest conversations

Another important part of good management is creating an environment where people feel able to be honest about how they are doing. In some workplaces, people worry that saying they are stressed or overloaded will make them look weak or as though they can't cope. That can mean people keep things to themselves until they are already really struggling. It can also make people less likely to ask for help, admit mistakes or speak honestly about workload pressures.

Most people are not expecting their manager to fix everything. Often, they just want someone to listen, take them seriously and help them feel supported.

One person who responded to the survey said:

"Have a genuine conversation about how you are getting on and not a quick passing by 'catch up' most of the time which is had in front of the whole office."

The legal sector does not need managers to become counsellors or mental health experts. But it does need workplaces where people feel comfortable speaking up early and know they will be listened to.

Many of the suggestions in the guide are simple and practical, because that is often what people need most. Done well and done often, they can change how work feels and help people build careers they can actually sustain. People may forget the detail of a case or deadline, but they remember how they were treated when things were hard. Feeling trusted, listened to and supported can stay with someone.

Good managers do not need to get everything right. People are usually looking for honesty, consistency and support. Most of the time, good management is making time for people, communicating clearly and treating them with respect.

Read LawCare's new resource: **10 ways to be a better manager**



Trish McLellan
LawCare's Interim CEO,

and **Niamh Warnock**,
LawCare's Engagement and Relationship Manager

BDLS CRICKET



For those of you who do not know, the Bournemouth and District Law Society has its own cricket team. The team has been running for decades and is known as Lex. Lex is “law” in Latin and so was aptly named many years ago. Despite the commercial pressures to remove legal jargon from our day to day, as lawyers we cannot help being drawn to the Latin language! Lex play cricket in the Bournemouth evening league throughout the summer. In addition, there is the occasional friendly match, social events and sometimes even a tour.

The most important ethos for Lex is to bring people from within the profession together and have fun. It is an inclusive group, and the main aim is enjoyment. The cricket is the platform that allows people to chat, share and most importantly laugh together. It is extremely useful to understand the successes and strains of others within the BDLS, and the informal discussions between people provides for this. It is also an important release. Away from the desk and the stresses of the next client phone call, in the fresh air and summer sunshine. It is an evening to enjoy the cricket.

The cricket has its highs and lows. There are some very talented players that turn out for Lex. There are also some who simply enjoy the camaraderie and banter. The important thing is that they

all come together and enjoy themselves. Winning is important, it always is, but trying to ensure that everyone plays a part is more important to Lex. It is what keeps people coming back.

This season, there has been some magnificent batting innings, some great bowling spells and some wonderful catches. The reverse is also true! The team are in the second division and came second. It was a really good achievement, having played some really good cricket, but also done in the right way. At the time of writing this, there is still a cup competition to finish. While there is every faith that Lex will do well, we have not cleared a space in the trophy cabinet just yet!

The most pleasing thing about this season has been the debutants. There have been several new recruits join. Younger players, that the team needed! Every single one of them has been a real asset in cricketing terms, but also a great addition to the group and willing to fit in and enjoy themselves. The group only thrives if the BDLS members continue to support it, and long may that continue.

If you are interested in learning more about BDLS Lex Cricket team, please contact me at s.freeman@laceyssolicitors.co.uk. ■

Sam Freeman
s.freeman@laceyssolicitors.co.uk



**LEGAL
OMBUDSMAN**
Model Complaints
Resolution Procedure

FARE MINDED: COMPLAINT HANDLING FOR SUCCESS

Legal Ombudsman launches new model complaints procedure to support efficient and effective resolution.

Awkward conversations with taxi drivers will be familiar to many people reading this article. "So, what do you do for a living?"

You check how far you are into the journey and how long is left. Do you answer honestly and find that you'll spend the rest of the trip explaining that you're not that kind of lawyer? There's a tiny chance this could turn into a new client, but you're probably dreading the inevitable series of red lights, half the BSM driving school out on the main roads and a story that might require you to explain how a nil-rate band trust works.

I have the same issue, but I also find I have to explain what an ombudsman is first.

For some of you, the description of what you do for a living might include dealing with complaints. If the conversation moves in that direction, you'll tell the back of your driver's head about some successes, where you've turned an unhappy client into a happy one. These are the real wins in that role, and, somehow, you wouldn't mind a bit of traffic on the high street now, so you can slip in that story from last year about the lady who took down her online review and replaced it with a message about how diligent you'd been in resolving her complaint.

My role means I have met a fair few complaint handlers over the years. Typically, the first thing they'll tell me these days is that clients have changed and complaint handling has become far harder than it used to be. I'll then get at least one story about "that" client. When I ask them about the complaint they're most proud of, the facts are diverse, but the broad themes are much narrower and the beaming grin is inevitable.

The perfect job is hard to find (my days of hoping I'd score the winner in the World Cup final ended early), but, with a little encouragement, complaint handlers always have a tale of success to-hand, and the pride in doing an important job well bursts through the lips.

Part of this is the philosophy of a firm. I've yet to see the website of a firm boasting, "our clients mean nothing to us", "we're here to do a job" or "leave us to it, thanks", and I'm grateful for this every day. Solicitors have trodden different paths to get to where they are, but they all want to provide a service that matters to people who need it. Whether it's completion day, the decree absolute, the final estate accounts or the transfer of the settlement money, there's rightly a feeling of satisfaction at a job completed to time, to cost and to expectation.

Considering the task of dealing with a complaint is ostensibly finding out why they're unhappy and trying to fix it, it might surprise some to know that the variety of complaints procedures we see is as wide as the taxi driver's understanding of "just around the corner". One stage? Two stages? We've seen eight. All in writing? Perhaps a meeting at the office to discuss? A partner sees it straight away? Maybe someone more junior calls the client first? And what about timescales? Is it all nicely spaced on the website or a wall of text? And is it a tab at the top or is it nestled in a list of policies you can find by clicking a link at the bottom?

It's mercifully rare these days we see reference to the right to a remuneration certificate, or an encouragement to contact the Office for the Supervision of Solicitors, but I've seen complaints procedures that I would bet good money are older than me.

"Why change a winning formula?" I hear you cry. Well, your clients have changed and what matters to them has changed with it. Good customer service is assessed by different criteria than it was when I started in this



Simon Williams, Legal Ombudsman

sector twenty years ago. The pressure on firms to deliver it might never have been higher. All of this in the context of the challenges we know lawyers are facing, with rising overheads, increasing competition and more besides. You might not get many complaints, but businesses are consistently telling us they're seeing more, so it's possible you might soon, too. Perhaps your complaints procedure can do more for you.

At the end of July, LeO launched its Model Complaints Resolution Procedure. We've taken good and best practice from procedures we've seen in our work, in legal systems abroad and in other sectors. With the blessing of the Legal Services Board and with the support of the regulators under the Legal Services Act, we have produced a model first-tier procedure that any lawyer in England and Wales may use as their own.

Adopting it is your choice, but my pitch is simple: this is an efficient procedure, with a focus on resolving – not just handling – complaints, and it comes with a suite of supporting guidance, templates and toolkits we've designed. There's guidance on how to deal with complaints while the case is ongoing, complaints when there is an outstanding bill, dealing with unreasonable behaviour, complaints written by artificial intelligence, and much more. Indeed, we will be developing more guidance, and we're eager to hear what else would help.

Being able to tell clients that you use the Legal Ombudsman's Model Complaints Resolution Procedure might offer assurances that your intentions in approaching any complaint match the organisational philosophy espoused on your website and in the client care letter. We're offering to help with that.

We also have a service to deal with ad hoc questions about complaints. Email our Technical Advice desk and a Senior Ombudsman will come back to you by email or phone to give you some guidance. If we can help you resolve something before it becomes a complaint, or before it gets worse, we're happy to do so.

The next time you're wincing at the question of what your line of work is, consider telling the driver about some of the times where you've turned a treacherous situation into a win. Like the 4.93-star chap in the Prius, the job you do matters to a lot of people every day. Stay proud of that, and, if there's anything we can do to help, let us know.

If you have any questions about the Model Complaints Resolution Procedure, please email MCRP@legalombudsman.org.uk ■

Firms' News

Lester Aldridge Announces two Partner promotions



Phoebe Chandler and Edward O'Brien

Lester Aldridge is pleased to announce the promotion of Phoebe Chandler and Edward O'Brien from Senior Associate to Partner.

Phoebe Chandler, in the firm's Real Estate group, and based in Bournemouth, specialises in Property Finance transactions including long and short term secured lending, bridging finance, portfolio refinancing and auction transactions. She works with a broad client base of borrowers and both regulated and unregulated lenders, supporting them through finance transactions with a practical and responsive approach.

Edward O'Brien, in the firm's Employment, HR & Business Immigration team, based in our Bournemouth and Southampton offices, advises businesses on a wide range of employment

and business immigration matters, both contentious and non-contentious. He works with clients ranging from large national and international organisations to SMEs, trade unions and individuals. Edward has particular experience supporting employers through complex workplace issues, including redundancy programmes, TUPE transfers, workplace disputes and sponsorship issues, as well as providing clear, practical advice on day-to-day employment and business immigration matters.



Lester Aldridge - Luke Stace joins the Property Litigation team



Lester Aldridge has appointed Associate Luke Stace to its Property Litigation team, reflecting continued growth and investment in its specialist real estate disputes offering.

Luke's arrival brings the specialist team to six lawyers, further deepening its expertise as it continues to advise clients on a wide range of complex commercial and residential property disputes. He advises on landlord and tenant matters, construction disputes, and professional negligence claims, as well as strategic dispute resolution, supporting clients with a pragmatic, commercially focused approach. ■



Luke Stace

Firms' News

Steele Raymond appoints employment law specialist

Steele Raymond has appointed employment law specialist **Dominic Holmes** as Head of Employment. Dom joins Steele Raymond with more than 20 years' experience advising employers, senior executives and business leaders on complex, strategic employment issues. He works with organisations ranging from fast-growth businesses and SMEs to multinational corporations and global brands, helping them navigate sensitive workplace disputes, senior appointments and exits, TUPE transfers, restructures and business-critical employment challenges.

Alongside his strategic support for employers, Dom also conducts independent workplace investigations into grievance and disciplinary issues. He regularly acts for senior executives on appointments, exits and workplace disputes.

Dom is Co-Chair of the Employment Lawyers Association's Training Committee and regularly presents on developments in employment law. He is also a long-standing mentor for the Leaders Plus Fellowship Programme, supporting professionals balancing ambitious careers with parenting responsibilities.



Harinder Sangha (Senior Associate, Employment Law) with newly appointed Head of Employment, Dominic Holmes

Dom is the author of *A Practical Guide to TUPE and Employee Transfers: Core Legal Principles, Tricky Issues and How It Really Works in Practice*, aimed at lawyers in private practice, in-house counsel and HR professionals who are navigating business transfers and outsourcing arrangements. ■

SteeleRaymond

Steele Raymond - New Appointment in Family Team

Steele Raymond has appointed **Helen Court** as a partner in its family team, taking the team to eight lawyers and fifteen people in total - one of the largest practice groups in the firm.

Helen joins from Dutton Gregory, where she has been a partner since 2022. Before that, she was a legal director at BDB Pitmans and spent thirteen years at Paris Smith, where she trained and qualified. She has close to twenty years' experience advising on the full range of family law, from pre-nuptial and cohabitation agreements through to complex financial settlements and arrangements for children. Helen will work across the firm's Bournemouth and Southampton offices, advising individuals and families throughout Dorset and Hampshire.. ■



Left to right (Back row): Carrie Butterworth, Lindsay Halliwell, Diana Schonemann, Giuseppe Pingerna, Daniel Sanders, Amy Baugh, Rebecca Smith, Natalie Jenkins, (Front Row) Debbie Hobday, Michelle Holt, Jenny Manley, Helen Court, Emma Hamilton-Cole.

SteeleRaymond

Firms' News

Stephens Scown expands Bournemouth team

Stephens Scown has continued to develop its presence in Dorset following the opening of its Bournemouth office, with a number of experienced lawyers joining the firm and further appointments planned.

Several of the new recruits have established careers advising businesses, organisations and individuals across Dorset and the wider region. Their experience spans a range of sectors that are important to the local economy, including manufacturing, food and drink, tourism, leisure, renewable energy and minerals-related industries.

The firm's Bournemouth-based Real Estate team has grown over the past year and now includes Commercial Property Partner, Chris Twaits, Senior Associate, Roisin Fisher, Senior Property Consultant, Jo Hammersley, Associate, Joel Holloway, and the most recent addition to the team, Senior Associate and Residential Development specialist, Henry Barker. The team works alongside colleagues in planning, construction and property litigation across the wider firm



Roisin Fisher, Jo Hammersley and Chris Twaits from Stephens Scown's Bournemouth office



Paris Smith marks Peter Taylor's retirement after 35 years.

Stuart Allen and Peter Taylor

Paris Smith is celebrating the remarkable career of Peter Taylor as he retires from the firm after 35 years of dedicated service, leadership and contribution to the business community across Hampshire and the wider region.

Over more than three decades, Peter has made an enduring contribution to Paris Smith as a lawyer, colleague and leader. He served as Managing Partner from 2015 to 2022, steering the firm through a period of significant development and through the unprecedented challenges of the Covid-19 pandemic. His leadership combined calm judgement, collaboration and a clear focus on supporting the firm's people, clients and communities.

In 2022, Peter handed over the baton of Managing Partner to Huw Miles and became Senior Partner, taking responsibility for leading the firm's strategy and purpose.

Peter's influence has also extended far beyond the firm. He served as President of Hampshire Chamber of Commerce and as Chair of the Southampton Chamber of Commerce leadership team, using those positions to champion regional enterprise, collaboration and economic opportunity. He has given his time to a number of community organisations as a trustee and, for many years, served as Vice - Chair of Governors at West Hill Park School in Fareham.

Stuart Allen, a Property Partner with extensive experience in property finance, leadership and management, succeeds Peter as Senior Partner. Stuart will lead the strategic board which has responsibility for the overall direction and success of Paris Smith, working with the firm's leadership team to continue its strategic growth while maintaining its focus on the changing future needs of its clients and staff. ■

Situations Vacant



Conveyancing Lawyer: 3+years PQE New Milton | Richard Griffiths & Co Solicitors

Job description

Vacancy Type: Full Time

Location: New Milton- this is not a remote position.

Hours of Work: 09.00 – 17.00 Monday to Friday

Rate of Pay: Depending upon experience

Job Description:

To undertake fee earning work in the property department and to administer all aspects of conveyancing work on behalf of the client and the firm.

We are seeking a qualified and experienced Solicitor / Legal Executive / Licenced Conveyancer with at least 3 years PQE. You should be capable of working unsupervised and confident in work you are undertaking.

You should have experience of managing your own caseload within high volume conveyancing and experience of both leasehold and freehold sales and purchases.

Key Accountabilities:

- You will be able to undertake all aspects of residential conveyancing and property work, both leasehold and freehold sales and purchases.
- Experience of commercial property would be an advantage though not necessary.
- You must have excellent IT skills.
- You must be able to prioritise your workload to meet tight deadlines.
- You should be able to work well as part of a team.
- You must have strong attention to detail.
- You should have a positive and friendly manner and present a smart and professional appearance.
- You should be capable of networking and building strong relationships with local estate agents.

The above list is not exhaustive and is subject to change. The post holder may be required to undertake other duties.

Qualifications:

- Solicitor
- Legal Executive
- Licenced Conveyancer
- 3 years PQE

Knowledge:

- All aspects of residential conveyancing

Skills/abilities/competencies:

- Able to prioritise work to manage your caseload effectively
- IT literate
- Client focused
- Experience of all aspects of residential conveyancing
- Experience of using SharePoint an advantage (training will be provided)
- Experience of using Leap and advantage (training will be provided)
- Experience of using Cashroom an advantage (training will be provided)

Experience:

- Experience of managing a high-volume caseload of varied residential property transactions without supervision

Personal Attributes:

- Able to work as part of a team
- Friendly and proactive
- Positive and hard working

- Able to network to build a strong relationship with third parties such as estate agents and mortgage advisers etc.
- Willing to contribute towards the future development of the department and company as a whole

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The Over-Compliance Problem in UK Law Firms

Anti-money laundering compliance, in theory, is mandated and designed to help firms identify risk and to counteract legitimate concerns about criminals who may be hiding or moving illegally obtained money. Increasingly, in practice, those legal professionals working in compliance or who are obligated to perform compliance checks report that is becoming time- and resource-heavy and a major stress for the industry.

That was the central concern raised at a recent Dye & Durham-Modern Law roundtable on AML in conveyancing, which brought together conveyancers, compliance leads and legal technology specialists from across the sector.

Chaired by Founder and CEO of Teal Compliance Amy Bell, the discussion set out a problem that will be familiar to most firms handling residential property work: compliance processes that keep expanding, without a corresponding increase in confidence that they're actually catching the right things.

The 3 Major Compliance Challenges Law Firms Face

Dye & Durham partnered with Modern Law on this roundtable to capture the sentiment of diverse legal practitioners and the issues they face in relation to meeting compliance demands and regulation. Three distinct compliance challenges were identified by the 13 conveyancers, compliance leads, and technology specialists in discussion.

The first was the sentiment that documentation has become a substitute for judgement rather than a way to understand one's clients. Many of those in attendance report that they are collecting more evidence not because it clarifies risk, but because it's easier to defend a thick file than a thin one if a regulator asks questions later. In short, firms may be collecting documents in anticipation of a regulator review rather than to fully understand a client.

The second was the increasing stress levels and toll this over-compliance was taking on staff with fee earners absorbing growing volumes of compliance work, much of it unbillable, on top of caseloads that were already stretched. As several participants reported, a culture of over-documenting has become the safer default, even when it adds nothing to the risk assessment itself, with newer lawyers in particular entering a profession where the fear of getting AML wrong shapes almost every decision.

The final issue reported was the inefficiency of duplication of processes and document collection with clients routinely asked to provide the same identity and source of funds evidence to multiple firms during a single transaction.

Advice on Compliance From Legal Practitioners

What can conveyancing firms do to cut down on these concerns and the practice of over-compliance? In the roundtable discussion, several pragmatic fixes emerged that firms can act on now without waiting for further regulatory clarity.

- **Apply a proportionality test to every request.** Before adding a document to a file, ask whether it changes the firm's understanding of the client's risk. If it doesn't, ask where it needs to be collected or whether it is being collected out of overcaution.
- **Set an internal and agreed bar for collection before any matter starts.** Deciding in advance what "sufficient" looks like for each risk tier prevents requests escalating ad hoc once a file is already underway and a fee earner is under pressure to be seen as meeting (or exceeding) requirements.

- **Redesign training around reasoning, not repetition.** Annual, box-ticking AML training was singled out in the roundtable as ineffective. Instead, shorter, scenario-based formats were favoured, on the basis that staff who understand why a check exists apply it more sensibly than staff who are simply following a script.
- **Review checklists on a fixed schedule.** Requirements added in response to a specific past incident tend to outlive their relevance. A periodic review keeps checks tied to actual risk rather than accumulated caution.
- **Explain the reasoning to clients.** When clients understand the purpose of a firm's checks, they are much more likely to comply. Much of the friction clients raise (and frustration that might result) isn't about the existence of AML checks; it's about the lack of explanation for why the same information keeps being requested.

Where Technology Can Help to Minimise Necessary Compliance Checks

The consensus at the roundtable was that automation has moved from a nice-to-have to close to a necessity, but only once a firm has already worked out what proportionate looks like.

Applied on top of a checklist that already over-collects, any technology that is used will just result in a faster over-collection. In contrary, when used well, technology can effectively remove the parts of the process that add cost without adding insight. Dye & Durham's Unity® platform, for example, integrates biometric ID and liveness checks, Safe Harbour verification for vendors and purchasers, and source of funds checks through open banking, directly into the case file, so results return in real time and the audit trail builds itself as the matter progresses, rather than being reconstructed after the fact. Layer on PEPs and Sanctions checks and you can identify clients on sanctioned lists or as a politically exposed person immediately. That kind of integration addresses the duplication problem in a limited but meaningful way too: firms triggering checks from data they already hold spend less time re-requesting information the client has already provided elsewhere in the same transaction.

What technology doesn't do, however, is replace the judgement that tells an experienced conveyancer when something isn't quite lining up with a client. Honing those instincts and using checks to verify remains an important skillset for anyone in compliance.

Final Takeaway

For any professional fielding these checks day to day, the roundtable's conclusion will likely match your own experience: the volume of AML work has grown faster than anyone's confidence that it's catching the right things.

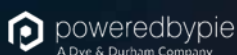
The way to challenge that reality isn't necessarily to collect more documentation; rather, it's ensuring that the processes and technology you and your firm adopts matches the compliance need, in a way that makes both firms and regulators confident that a firm truly knows their client.

This piece draws on discussion from the Modern Law roundtable series, hosted by Dye & Durham and chaired by Amy Bell. Read the full roundtable in Modern Law Issue 82. ■

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MIGRANT SUPPORT HANDBOOK

LEGAL ACTION GROUP

The access to justice charity

By Shu Shin Luh and Connor Johnston

AN INDISPENSABLE HANDBOOK FOR SPECIALISTS IN IMMIGRATION LAW, YET ACCESSIBLE TO ALL INTERESTED READERS



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

Is there a new law text out there that is more topical than this? Not to mention more vital than this? Probably not -- although many may well argue the point. It is indisputable, however, that mass migration, whether legal or illegal, has become an international problem, particularly for the UK -- and in the view of many -- it is a problem that is well-nigh insoluble.

It is fair to say, however, that immigration lawyers in particular -- as well as anyone involved in, or committed to, achieving viable solutions to the problems inherent in migrant support -- will welcome the publication of this book by the Legal Action Group.

Authors Shu Shin Luh and Connor Johnston have noted that the book (conceived some six years ago) was painstakingly researched and written to 'replace the irreplaceable' "Support For Asylum-Seekers" by Sue Willman and Steve Knafter QC, published by LAG in 2009.

It is sobering to recall how much and how quickly and relentlessly the world has changed since then -- making the problem of asylum seekers ever more acute. The publication of this book is therefore all the timelier.

And certainly, the almost insoluble complexity of its subject matter is reflected in its more than 1,200 pages of scholarly and thorough research presented (in the tradition of the LAG) in a clear, accessible style; accessible, that is, not only to lawyers, but to anyone interested in, or involved with, this detailed and certainly controversial and difficult subject, which has occasioned so much debate.

With its focus on the welfare and legal rights of migrants, the book provides in-depth coverage of, for example, housing and welfare, benefits, NHS access and provision and social services, as well as support for failed asylum seekers with reference to special cases; notably unaccompanied children and -- most heart-rending of all -- the victims of human trafficking.

This is a handbook you could almost call encyclopedic. Certainly, it offers specialists in this wide-ranging and many-faceted and complex area of law, a gateway to further research. Note that the first 150 or so pages contain tables of cases... statutes... statutory instruments... immigration rules... and a table of European and international legislation.

Also, for the volume of its size, it is remarkably easy to navigate, containing copious footnotes, a detailed table of contents and an even more minutely detailed index of at least 115 pages.

A handy handbook? Absolutely. As immigration -- both legal and illegal -- will undoubtedly emerge as a prime issue during elections and beyond, this scholarly yet eminently readable volume will prove indispensable, not only to practitioners, but to anyone interested in the wide-ranging issues inherent in this undeniably difficult area of law. ■

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Closing the Profitability Gap in UK Law Firms



Craig Matthews
CEO, LEAP UK

Read the full
report here



“Nearly 18 weeks a year is currently lost to non-billable work. This is not a marginal issue; it is a systemic one. But it is also solvable. The firms that act decisively to address it will help define the future of legal practice in the UK.”

UK law firms are at a critical inflection point. While nearly seven in ten firms report increased profitability over the past year, the reality beneath that headline tells a different story. Significant inefficiencies remain embedded within daily operations, limiting how far firms can truly grow.

Recent research from LEAP’s Profitability in Law: Global Report 2026, based on insights from 700 legal professionals across six markets, highlights a clear disconnect between potential and performance. An overwhelming 93% of firms believe they could be more profitable, yet many continue to operate with fragmented systems, manual processes and limited adoption of modern technology.

One statistic stands out above all: UK legal professionals are spending close to three hours a day on non-billable tasks. Over the course of a year, that equates to 88 working days, or nearly 18 weeks, lost to work that does not directly contribute to revenue.

This is not just an operational inefficiency. It is a structural challenge impacting profitability, talent retention and longterm competitiveness.

The cost of inefficiency

Across the sector, administrative burden remains one of the most persistent barriers to growth. Nearly half of firms cite excessive manual work as a key issue, while over a third struggle with managing multiple disconnected systems.

These inefficiencies create duplication, increase risk and prevent lawyers from focusing on high-value, client-facing work. At the same time, firms are navigating rising pricing pressure, making it even harder to maintain margins while delivering quality service.

The result is a profession being squeezed from both sides: external pressure to deliver more value, and internal limitations that restrict efficiency.

A growing pressure on people

The operational strain is also having a clear impact on people. Burnout is now reported as a widespread issue, with the majority of firms identifying it as a concern, alongside high levels of staff turnover. When highly trained legal professionals are spending hours on repetitive administrative tasks, the consequences extend beyond lost productivity. It affects engagement, retention and the overall sustainability of the firm. Without change, this pressure risks undermining both performance and culture.

Technology as the turning point

Encouragingly, the path forward is already visible. Firms that are investing in integrated technology and AI are beginning to close the productivity gap. A significant majority of legal professional’s report that AI is already delivering measurable time savings, particularly in areas such as document review, drafting and workflow automation.

The UK market is emerging as a leader in this transition. Firms are demonstrating strong adoption of AI and workflow technologies, particularly in areas that directly impact efficiency and client delivery.

This shift is not about replacing legal expertise. It is about enabling it, freeing lawyers from administrative burden so they can focus on higher-value work.

From awareness to action

Despite widespread recognition of the problem, execution remains inconsistent. While automation and better technology are widely acknowledged as priorities, far fewer firms have taken meaningful steps to reduce administrative load or consolidate their systems. Closing this gap requires a more deliberate approach.

Firms that successfully improve profitability are those that focus on eliminating non-billable work, integrating their technology stack and equipping teams with tools that support efficiency at scale. Responsible adoption of AI, with appropriate verification and oversight, is also becoming a key differentiator.

Defining the future of legal practice

The legal sector has always evolved, but the pace of change is accelerating. Firms that modernise their operations now are positioning themselves for stronger profitability, improved client service and better staff retention.

Those that delay risk falling behind in an increasingly competitive market.

DISCRIMINATION IN HOUSING LAW

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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The Firm That Built for the Future and Arrived There Early

When Adam Creasey and Benedict Cressey founded Adam Benedict in 2023, they set out to challenge how law has traditionally been practised. Adam is a solicitor; Benedict brings a non-legal perspective to the firm's leadership. They wanted diverse perspectives at the leadership level and structured the firm as an Alternative Business Structure to make that possible.

Their founding principle was simple: put clients first in every decision, from pricing to process. That meant moving away from the billable hour towards fixed fees, value-based pricing, subscriptions, and fee caps.

"I have seen things from both sides, but ultimately the legal profession needs to catch up with the modern world in terms of service delivery and how we prioritise working with clients rather than against them," Adam says. "That's not just about fee structures, it's about our entire operation."

Technology was central to that investment before the firm had taken on a single client. After reading Clio co-founder Jack Newton's book, *The Client-Centred Law Firm*, Adam saw a clear fit.

"Having read Jack's work, I knew that Clio was going to be aligned with us, both in terms of values and service offering."

Clio became the firm's core platform from day one.

From faster turnaround to more client trust

For a firm built around delivering more for clients, pace matters as much as quality. In a recent M&A transaction, the firm on the other side had 35 specialist lawyers and took three weeks to turn around a share purchase agreement. Adam Benedict returned a redlined document in 48 hours using Clio Work. "All the parties want this transaction," Adam says. "What they don't want is for creaky old law firms to hold it up."

In another example, a client came to them after a different firm had held the case for nine months without any meaningful progress. Adam made a promise: attend a Friday afternoon meeting, and by the end of it, the client would have a full legal strategy, an evidence gap analysis, a litigation budget, and a detailed assessment of the other side's likely litigation strategy. Working with his colleague and using Clio Work, the team delivered all four within 24 hours. The intermediary on the call was so impressed that he later referred a multi-million-pound litigation matter originally intended for another firm.

"We're able to help more and more people with the same headcount, the same capacity."

Three years in, and already making history

Adam Benedict has grown from a two-person startup to a team of ten. Turnover has increased by more than 200%, as has its client base.

"We almost tripled revenue from year one to year two through client loyalty and some fantastic cases that we have managed to bring on board, punching way above our weight."

By the end of 2026/2027, the firm expects to significantly increase revenue without adding another lawyer.

Its reputation has grown too. Adam Benedict was named one of The Times Best Law Firms 2025, ranked among the UK's top construction

law firms, and won the 2025 Reisman Award for Best New Law Firm. Most notably, the firm has already made legal history three times, helping create new UK law in the construction sector.

They were working on a construction case at the time that produced the first finding of relevant liability under section 130 of the Building Safety Act, the first Building Liability Order and the first information order under the Act—all in a single matter. "That's historically important because the Building Safety Act is the post-Grenfell legislation," Adam explains.

The decision shows how the Act can be used to prevent construction companies from avoiding liability for unsafe work through corporate restructuring or the winding up of subsidiaries.

"It's probably the most important development in the construction industry in the last 100 years or so, and to be the first to have gotten that is a real achievement."

The model and where it goes next

From the start, Adam and Benedict knew a client-centred firm needed strong operations behind it. If tasks like admin, communication, and billing can slow their firm down, everything else suffers. "We're a small team. There are always going to be bumps in the road and imperfections, but we're constantly looking at trying to make it better," Adam says.

"That's with the help of having a piece of software from people who really understand the problem that we're trying to solve. It's been incredibly important."

The team can take on more complex work, move faster, and give clients the kind of visibility and transparency that even larger firms struggle to deliver consistently. Having Clio at the centre of the practice makes that possible at scale. Adam Benedict can automate workflows, streamline billing, and give clients direct access to their case updates and documents through Clio's client portal.

"I love the fact that clients get an app on their phone," Adam says, "a one-stop shop for their legal needs." It also supports the firm's approach to pricing. Moving away from unpredictable hourly rates means clients know what they're paying before work begins. The firm's systems make that model practical.

Benedict sums up the long-term approach: "Things change all the time, but the key for us is to maintain regular contact with our clients, nurture good relationships, and take on board what they say. Then it's down to us, as their lawyers, to look further ahead, so it benefits them in the future."

In only three years, Adam Benedict has grown fast, made history, and built something that looks nothing like the profession it set out to challenge. ■

HEAD & WHEBLE CENTENARY CELEBRATION!



Reaching a centenary in business is a milestone worthy of recognition, so on the warm evening of Thursday 25th June, family, friends, colleagues and members of the funeral profession gathered at the Marsham Court Hotel in Bournemouth to celebrate 100 years of Head & Wheble Funeral Directors - a truly remarkable achievement for one of Bournemouth's longest established funeral businesses. A Century of Compassion: The Head & Wheble History The roots of this esteemed Bournemouth firm trace back to the early part of the 20th century. Founder George Head, supported by his wife Minna, established the business with a clear vision: to advise and support bereaved friends, relatives, and associates with the utmost care.

Having worked alongside J.J. Allen (of Westbourne) since the 19th century with his brothers from a young age, George developed the deep sensitivity and care required to excel as a funeral director. From these early beginnings, the family business grew year after year, built on the foundations of community recommendations. In 1926, George officially established his Funeral Service at 1a Oxford Road, Lansdowne, Bournemouth—the very premises where the current generations continue to operate to this day. In 1943, George formed a partnership with another existing funeral director, Charles Wheble. Both partners, supported by their wives, were leading lights in their respective churches and clubs, cementing the firm's place at the heart of the community.

Passing the Torch Through the Generations The post-war era brought the next generation into the fold. In 1946, following his service in the Royal Navy, Philip Head joined his father in the family business. Ably supported and encouraged by his wife Esmé, Philip maintained and developed strong friendships within the

local community, upholding cherished family traditions while steadily carrying the business forward. Recognizing the timeless importance of trust and compassion during bereavement, Philip welcomed his son—and grandson of the founder—Simon, into the business in 1992, alongside his wife, Catherine. Both Simon and Catherine remain actively involved in the day-to-day operations today, and their tireless efforts have been paramount to sustaining the business into the modern era. The future of the firm looks equally bright. In 2016, Simon and Catherine's two sons, James and Robert, entered the business. As the fourth generation, they are successfully retaining the strong family influence that surrounds a traditional independent firm, ensuring its longevity for many years and generations to come.

Honouring the Past, Embracing the Future Since George Head first opened his doors in 1926, societal attitudes towards death and the expectations placed upon a funeral director have undoubtedly evolved. However, the Head family continues to serve the Bournemouth community by firmly adopting the strong principles laid down by their founders, seamlessly blending them with modern facilities and contemporary service.

Representing the National Association of Funeral Directors were National President Darryl Smith and his wife, Lesley, Vice President Julian Hussey and his wife, Karen, together with Southwest Standards & Quality Manager, David Hunter, who joined Simon and Catherine Head, their son Robert, staff, family members and invited guests in marking this significant occasion. Everyone at the NAFD extends their warmest congratulations to Head & Wheble Funeral Directors on this exceptional milestone and wishes the family every success as they begin the next chapter of what is already a remarkable story.

National President of the British Institute of Funeral Directors Clive Pearson, his wife Leanne and First Vice President Phil Gore attended the

100th anniversary celebrations of Head & Wheble Funeral Directors in Bournemouth, where they thoroughly enjoyed an evening filled with warmth, reflection, and celebration. To reach 100 years of continuous family service is a rare and beautiful achievement in our profession. The BIFD applauds Head & Wheble for their unwavering commitment to dignity, tradition, and community over the last century, and we wish them continued success for the next hundred years.

During the event an introduction speech was given by the family's 4th Generation Funeral Director Mr Robert Head, "Our centenary celebration was a wonderful opportunity to reflect on a century of supporting families through life's most difficult moments. We are incredibly grateful to everyone who joined us to mark this special milestone and to those who have placed their trust in our family over the past 100 years. Here's to honouring our history, celebrating our community and continuing to serve future generations with the same dedication and kindness."

Robert also welcomed his father and Owner of the business Simon Head, Darryl Smith, National Association of Funeral Directors and The Dorset & Somerset Air Ambulance (their nominated charity of the year) to say a few words. Linda Magistris from the Good Grief Trust who they have recently partnered with was also in attendance – it is their 10-year anniversary this year and they are taking huge steps forward in the bereavement sector. ■





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