

## WEBINAR: ISSUES WHEN DEALING WITH TRUSTS

**THURSDAY 30 APRIL 2026 – 10:30 – 12:30**

- Webinar details:** The platform is **Zoom** and can be viewed on a mobile, tablet, laptop or PC. The link to join will be emailed to you nearer the time. It would be helpful to download Zoom on to your device beforehand - the app is Zoom Cloud Meetings. Please note that it may not be possible to access your video and microphone if you are remote accessing your office computer - you may want to forward the link.
- Cost:** £75 – Member and Associate Members of BDLS/Trainee Solicitor  
£105 – Non-Member of BDLS
- Booking Reference:** 679
- CPD:** 2
- SRA Competence:** B [SRA | Statement of solicitor competence](#) | [Solicitors Regulation Authority](#)
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Trusts come in all shapes and sizes. It may be a small trust arising on intestacy or a mega-family settlement. This session looks at some of the issues which trustees may have to deal with.

- The rule against self-dealing and the proper purpose rule. We will look at recent cases including:
  - *Re McDonald (Deceased)* [2022]
  - *Kane v Radley-Kane and Others* [1999]
  - *Caldicott v Richards and Walker* [2020]
  - *Brealey v Shepherd* [2024]
  - *Da Silva v Heselton* [2022]
  - *Wong Liu Sheung v Burt* [2005]
  - *Smith v Michelmores Trust Corp Ltd* [2021]
  - *Grand View Private Trust Co Ltd and another v Wong and others (Bermuda)* [2022]
- Matters to consider when exercising powers of appointment and advancement:
  - Inadequate deliberation: *Dawson-Damar* [2025]
  - Extent to which wishes and intentions of settlor can properly be taken into account: *Dawson-Damar* [2025]
  - Tax implications: IPDI trusts and relevant property trusts
- Removal of trustees
  - Grounds: *Smith v Campbell* [2025]
  - Costs: *Smith v Campbell* [2025]

After this session you will be able to:

- Identify issues relating to trustees' obligations and responsibilities, and
- advise trustees and beneficiaries appropriately.

### Speaker Profile:

This webinar will be presented by **LESLEY KING**. Lesley King is a Professional Development Consultant at the University of Law; Co-Author of Wills, Taxation and Administration: A Practical Guide; A Modern Approach to Wills, Administration and Estate Planning (with Precedents); A Practitioner's Guide to Wills; Wills: A Practical Guide and Editor of The Probate Practitioner's Handbook. She writes and lectures extensively on Wills, Taxation and related matters.



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