

January 2024

# Private Client Monthly Roundup

The latest news and updates from our Private Client team

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Welcome to our first Private Client Department Newsletter, written by Jade Steel and Bella Scally, who are members of the Private Client Marketing Committee. Let's introduce you to the team...

- **Jane Cox** (Partner and Head of PC)
- **Sue Nicholson** (Partner)
- **Kevin Horn** (Partner)
- **William Ware** (Consultant)
- **Caroline Johnstone** (Associate)
- **Karon Walton** (Legal Executive)
- **Antoinette Merryfield** (Solicitor)
- **Jade Steel** (Trainee Solicitor)
- **Kim Efford** (Paralegal)
- **Bella Scally** (Paralegal)
- **Isabelle Carpenter** (Paralegal)
- **Michael Thompson** (Paralegal)

Supported by Amber, Daisy, Diane, Helen, Karen B, Karen D, Lilly, Paige, Shavin and Stephanie.

For expert assistance with Wills, Trusts, Probate, or any Private Client matter, please do not hesitate to contact us on **01329222075** or email [PrivateClientSupportTeam@warnergoodman.co.uk](mailto:PrivateClientSupportTeam@warnergoodman.co.uk).

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## Our Location and Upcoming Events

We have offices in Fareham, Southampton, Portsmouth, Waterlooville and Chandlers Ford.

**Join us at these upcoming community events:**

- **Dementia Support Group Meetings** (1 pm – 3 pm)
  - Trinity Church Fareham: Every second Thursday
  - Holy Cross Church Hall, Eastleigh: Every second Friday
- **Fareham Business Expo** – Thursday 22nd February

## Our Recent Events

Our team members have been keeping busy at several events in the community, including the Fareham Borough Council Business Events at Fareham Job Centre and The Cormorant Pub in Portchester and ending the year at the Dementia Support Christmas event.



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## Bella Scally Named Representative for South Hampshire Junior Lawyers in HILS

We're thrilled to announce that our esteemed colleague, Bella Scally, has been appointed as a representative for the South Hampshire Junior Lawyers Division within the Hampshire Incorporated Law Society (HILS). This accomplishment reflects Bella's dedication and expertise.

Join us in congratulating Bella on this fantastic achievement! For more updates, stay connected on LinkedIn.

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## Case Study Spotlight: Archibald v Stewart 2023

### The Law

The Inheritance (Provision for Family and Dependants) Act 1975 allows specific classes of individuals to make a claim against a deceased's estate where they have not received a reasonable financial provision. Any such claim must be made within six months of the date of Grant of Probate or Letters of Administration.

### The Facts

Neil and his wife Julie brought a claim against Neil's deceased parent's estate. Unfortunately, Neil passed away before the claim was concluded, and therefore, Julie proceeded with her late husband's claim and her own claim.

The Court had several questions to consider, one of which was whether Julie had a legal standing to pursue her late husband's claim on his behalf.

### The Outcome

The Court concluded the following;

- Under Section 1(1)(d) of the 1975 Act, Julie was not eligible to make a claim as a daughter-in-law.
- There is a high evidential threshold that in-laws must meet.
- The 1975 claim dies with the claimant.

That's all for this month's Private Client Roundup. Thank you for reading!