

# TRUST AND ESTATE DISPUTES

No two **will or trust disputes** are the same.

Each has its **own complexities** and requires **specialist expertise.**

MERCERS  
*Solicitors*



## Peter Hopkins TEP CTAPS

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### **Private Client Partner**

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Full member of the Society of Trust and Estate Practitioners (STEP)

Registered member of the Association of Contentious Trust and Probate Specialists (ACTAPS)

Associate member of Solicitors for the Elderly (SFE)



## Chris Bowler

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### **Litigation Partner**

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Senior Partner

Head of Litigation



## Beatrice Calderbank CTAPS

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### **Litigation Associate**

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Registered member of the Association of Contentious Trust and Probate Specialists (ACTAPS)

Associate member of Solicitors for the Elderly (SFE)



## Shella Glanfield TEP

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### **Private Client Associate**

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Full member of the Society of Trust and Estate Practitioners (STEP)

Full member of Solicitors for the Elderly (SFE)



*Peter Hopkins managed our limited budget with care, checking our accounts with the expertise of a forensic and advising us wisely and clearly on our choices. We won our case with costs awarded against the other party. I remain grateful for their professionalism, wisdom and intelligent care during this difficult case.*

**MRS J G W, SURREY**

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*I would like to add my sincere and heartfelt thanks to Chris for his unstinting support and guidance throughout this long and difficult process and, at times, also keeping me sane and on the right track.*

**MRS J S L, BERKSHIRE**

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*Four solicitors thought the case was a lost cause and it was only when we approached Peter and Beatrice at Mercers that they were willing to take it on. They explained to us from the outset that the case would be difficult. But 'there's always more than one way to skin a cat' and Beatrice found it and won the case for us.*

**MR P, LEICESTER**

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*I would thoroughly recommend Mercers – I found the advice Shella offered on a contentious probate to be very constructive – and it enabled me to feel at ease. I appreciated her attention to detail; I found it extremely helpful that she followed up her advice with an email on the same day. Thank you Shella for a clear, professional and very informative service.*

**MRS C F, WATFORD**

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# Our specialist experience

- Defeating Inheritance Act 1975 claims for charity
- Defending and mediating proceedings for a widow: will validity (lack of testamentary capacity and want of knowledge and approval); application for independent administrator; breach of trust in Jersey
- Securing increased provision under the 1975 Act for disappointed beneficiaries
- Obtaining emergency freezing injunction to prevent removal of assets from jurisdiction
- Successfully compromising Nil Rate Band construction claim
- Defending allegations of undue influence
- Mediating proprietary estoppel claims over farms to secure charity legacies
- Rectifying wills and trusts
- Preventing misappropriation of estate and trust assets and securing return
- Investigating and halting elder abuse
- Helping families with extensive trust and corporate restructuring in the face of family dysfunction and breakdown
- Enabling trust beneficiaries to maximise benefit and manage personnel
- Securing Court approval of trustee decisions
- Conducting Court of Protection proceedings

## Beatrice Calderbank worked on the following reported cases whilst at leading international law firm Withers LLP:

- JF and MF v Hexagon Investments Limited [2014], in which the Cayman Grand Court considered whether transfers were made onto trust, incurring significant tax
- A 2014 reported account of professional trustee's fees
- Fischer v Diffley [2013] EWHC 4567, will validity dispute (testamentary capacity)
- Acting for trustees from first instance to Supreme Court in Futter v Futter [2013] UKSC 26 applying to set aside advancement due to incorrect advice
- RBS Coutts (Cayman) Ltd v W and Others [2010] (2) CILR 348, a landmark case on trusts in divorce and Cayman firewall legislation

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