

## WEBINAR: TAKING INSTRUCTIONS FOR WILLS

**WEDNESDAY 24 JANUARY 2024 – 11:00 – 13:00**

<b>Webinar details:</b>	The platform is <b>Zoom</b> 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.
<b>Cost:</b>	£75 – Member and Associate Members of BDLS/Trainee Solicitor £100 – Non-Member of BDLS
<b>Booking Reference:</b>	981
<b>CPD:</b>	2
<b>SRA Competence:</b>	B <a href="#">SRA   Statement of solicitor competence   Solicitors Regulation Authority</a>

**Wills which (allegedly) do not carry out the client's instructions are one of the most common areas for litigation. This session looks at how to limit the likelihood of such actions. It also considers how to help clients achieve their wishes. This webinar will cover:**

- **Information required**
  - **Assets, beneficiaries, property eligible for relief**
- **Avoiding misunderstandings.**
  - **Lessons from *Coles v Reynolds*, *Wales v Dixon*, *Royal Commonwealth Society For The Blind v Beasant & Davies*, *Re Williams (Deceased)*, *In Estate of Michael Nodes***
- **The importance of documentation.**
- **Identifying steps that may be required.**
  - **LPAs**
  - **Changes to company/partnership structures**
  - **Severance of joint tenancies**
- **Helping client achieve their wishes.**
- **Assessing capacity.**
  - **The implications of *Clitheroe v Bond* and *Baker v Hewston* on the test of capacity**
  - **What constitutes an insane delusion.**
  - **What to do if concerned about capacity or undue influence.**

**It is, of course, impossible to guarantee problem-free will drafting but simple steps will reduce the chances of misunderstandings and challenges.**

**After this session you will be:**

- **aware of the recent case law on capacity and poor office practice, and**
- **able to adapt your office practice and procedures appropriately.**

### Speaker Profile:

This webinar will be presented by **LESLEY KING**. Lesley is Professional Development Consultant at the University of Law is 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 is the Wills and Probate Columnist for the Law Society Gazette, and writes and lectures extensively on Wills, Taxation and related matters.



### Please book online at:

<https://www.bournemouthlaw.com/bournemouth-district-law-society-lectures>

**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 be aware that payment must be received at the office before the lecture takes place. Course bookings will only be confirmed upon payment. All payments are to be paid by BACS. No refunds within 7 days of the course.