

## MANAGING A PROFESSIONAL DEPUTYSHIP IN PROPERTY AND FINANCIAL AFFAIRS

**THURSDAY 9 JANUARY 2025 – 09:15 – 12:45**

<b>Registration:</b>	08:45
<b>Venue:</b>	Carlton Hotel, East Overcliff Drive, Bournemouth, Dorset BH1 3DN
<b>Parking:</b>	Please note the entrance to the car park is in Grove Road. There is no charge for BDLS delegates to park – just inform Reception of their car registration number when they arrive. The car park has recently been extended so there is now plenty of parking available. Alternatively, there is metered street parking on the roads around the hotel. f
<b>Cost:</b>	<b>£95</b> Solicitor Member; Associate Member; Trainees (Solicitor, Cilex & Apprentices) <b>£145</b> Non Member of BDLS
<b>Booking Reference:</b>	613
<b>CPD:</b>	3
<b>SRA Competence:</b>	B <a href="https://www.sra.org.uk/solicitors/resources/continuing-competence/cpd/competence-statement/">https://www.sra.org.uk/solicitors/resources/continuing-competence/cpd/competence-statement/</a>

*Louise Levene from Finders International, sponsors for this event, will commence with a short presentation regarding Finders' work on estate administration, with a focus on genealogy and verifying family tree information.*

Many firms take on the daily affairs of clients that lack capacity as a professional deputy. However, this area of law is fraught with pitfalls, and it is imperative that all practitioners are aware of the standards, rules, and regulations in this area. The new deputy standards have been introduced that now apply to all deputies, and in addition the fixed costs structure has been updated. Many practitioners are now being faced with day-to-day management of P's affairs. Failing to account for these correctly could result in the firm being removed as deputy. This seminar will cover the routine practice and procedure for a deputy managing the property and financial affairs of 'P'. It will provide private client practitioners with practical management tips as well as up to date case law and advice on how to prepare your file for costing and billing. **What You Will Learn:**

- A reminder of the rules in the Court of Protection, including the new OPG deputy standards
- Court visitors
- Day to day management - what should you be looking out for?
- How to prepare your file for costing and billing at the SCCO
- Up to date case law

### Speaker Profile:

This lecture will be presented by **Helen Forster**. Helen is the managing director of her law firm, HTF Legal, based in Yorkshire, she is a solicitor and trusts and estates practitioner and has spent over 14 years working in the private client sector. Over the years she has received numerous awards including the category of rising star in England and Wales in the Modern Law Awards in 2016, where she came second. More recently her firm has won "inheritance firm of the year Yorkshire" in 2023. Her particular specialisms include tax planning and mental capacity work and, in addition, she provides training and seminars around the country on the subject



**Please book online at:** <https://www.bournemouthlaw.com/bournemouth-district-law-society-lectures>

**Course Notes:** 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.