



The Brief

The Personal Law newsletter of Bennett Griffin Solicitors' Private Client Division | issue 2

Welcome to BG

A very warm welcome to your second issue of The Brief, the Bennett Griffin newsletter for private clients.

The Brief is designed to be an informative and valuable resource so please let us know what you think about it and indeed any subjects that you would like to see included in future issues. You may even win a voucher for £25 to spend at Roundstone garden centre in Worthing.

You can find out more about this on the back page.

Enjoy the read and we look forward to hearing from you.



Ian Macara, Partner,
Private Client Division of
Bennett Griffin

Here to help you



Jo Ostrom
Solicitor in the Wills, Probate,
Trusts Services Department

At Bennett Griffin, our unrelenting commitment and focus is on building long-term professional relationships with our clients so that they are confident in our support as their trusted legal advisor throughout life.

At the heart of these trusted and valued relationships are a number of skills including the ability to listen attentively and to ask both perceptive and incisive questions. Our approach is holistic, because getting to know you is important in building a long-term relationship where you feel comfortable and confident in your dealings with us.

In this issue of The Brief we wanted to share with you a recent experience with one of our private clients. It's worth mentioning that we encourage each one of our clients to give feedback on a regular basis. It is a winning formula where everyone benefits. Constructive feedback enables us to further improve our services and of course positive feedback is always welcomed.

In this particular case, our client, a lady, contacted our team for help and advice from **Jo Ostrom** regarding her husband's affairs, because

he had been diagnosed with Alzheimer's. As his illness progressed, his Power of Attorney had to be addressed with some urgency. Sadly, our client's husband passed away and our client once again turned to us for assistance regarding the administration of his estate.

During this period we were also able to review her own Will to ensure that it was drafted in the most appropriate and beneficial way for her given her sad change of circumstances. We were heartened to receive a letter from our client in which she wrote: *"I only have praise and gratitude for the sensitive manner in which my husband was treated... in my own grief and distress, I found the efficient, courteous and compassionate approach to my affairs a great comfort. It is my pleasure to recommend the Firm."*

IN THIS ISSUE

Here to help you

Our commitment and focus on building long-term professional relationships

The importance of values

Values provide stability, strength and longevity

Technical expertise

Another thread that runs throughout Bennett Griffin

Bringing wisdom to wealth

In this uncertain economic climate it's understandable why so many people are now seeking professional and qualified financial advice for the first time.

We are family

If you are ever in need of constructive experienced and helpful advice on family matters, speak to our family law experts

Have your say!

We would love to hear from you

Please call one of our specialist Private Client team if you would appreciate seeing how we can help you and your family - **01903 229999**

The Importance of Values

At the heart of any client focused organisation are a set of core values. Like the roots of a mighty oak tree, these values provide stability, strength and longevity.

In our first issue of The Brief, we focused on **trust** and **respect**, two of our five key values. In issue two, we explore why understanding value, being service focused and continually improving our technical expertise is the lifeblood of Bennett Griffin Solicitors Private Client Division.

Understanding Value

It's natural that each one of our clients has their own perception of the value they place upon their relationship with us. Some clients value the peace of mind that comes from knowing that their Will is robust. Other clients value the certainty of knowing that in the event of deterioration in their health, they have a trusted advisor to administer their affairs. Other clients value our clarity in communicating the costs that are associated with instructing us. We value each one of our clients and will always seek to reassure you that as your trusted adviser, we are here to support you and your family as much or as little as is needed throughout your life.

Service

It is always heartening to receive what is now consistent survey feedback from our clients that our commitment to client service is a much appreciated asset. Our entire team is centred on the concept of accountable service, namely that we are here to serve and support you. To accomplish this, we have established the following:

- direct dial telephone numbers
- personal e-mail addresses
- personal assistants for each lawyer
- offering home visits
- developing strong and valued contacts with local businesses that we and our clients can trust

Technical Expertise

Another thread that runs throughout Bennett Griffin is that of continual professional development. Improving our knowledge and expertise is vital and of course it's key to delivering an exemplary service.

The law is constantly changing as are client situations. Within our private client team we have a diverse range of skills and expertise. You may be interested to read more about **STEP** (The Society of Trusts and Estate Practitioners) and **LEXCEL** (The Law Society Excellence Award), both examples that show how seriously we take our commitment to building our technical expertise.

Excellence with LEXCEL The Law Society Excellence Award

We are proud to be one of a small handful of private practices in Sussex to have been awarded prestigious Lexcel accreditation and to have retained it. The Lexcel Practice Management Standard is only awarded to those solicitors that meet high management and client care standards.



Lexcel accredited practices undergo rigorous independent assessments every year to ensure they continue to meet the required standards of excellence in areas that include client care, case management and risk management

Taking an important STEP - Society of Trusts and Estate Practitioners

We are delighted to announce that **Ian Macara** has now completed his STEP Accreditation process. In doing so he has been admitted as a full STEP member alongside



Ian Peterkin. Both **Tania Clapham** and **Greg Woods** are now two thirds of the way to full STEP membership, and on target to qualify in 2010.

STEP members are experts from the legal, accounting and banking professions who can support you through any trusts or estates issues. STEP members are accredited experts in:

- estates and succession
- domestic and offshore trusts
- trust and estate litigation
- tax planning

Full members of STEP are by definition the most experienced and senior practitioners in trusts and estates. When you see the letters TEP (Trusts and Estates Practitioner), you can be confident it is a hallmark of quality.

A Talented Threesome

We are delighted to congratulate **Tania Clapham**, **Greg Woods** and **Jackie Mensah** on their well deserved appointment to Associate status at Bennett Griffin. The partners were keen to recognise the consistently high standards of client care and technical expertise that they have each demonstrated in abundance.

Tania, Greg and Jackie each have long standing family ties to Worthing and combine their local knowledge with their legal expertise to ensure a first class service to their clients. If you would like to know more about them then please do review their CVs on our website at www.bennett-griffin.co.uk

Please call one of our specialist Private Client team if you would appreciate seeing how we can help you and your family - **01903 229999**

Bringing Wisdom to Wealth

In this uncertain economic climate with many of the financial institutions



once regarded as 'safe as houses' being undermined, it's understandable why so many people are now seeking professional and qualified financial advice for the first time. Indeed, as a result of many of our own clients asking us for guidance on how they could access strategic financial advice, we have developed BG Wealth Ltd.

It makes sense doesn't it? There are always close links between the legal issues that we advise on and financial matters. BG Wealth Ltd is an associated firm of chartered financial planners with two excellent and highly qualified financial advisers (**John Kelly**, also a Chartered Accountant, and **Andrew Melbourne**), both of whom are Directors together with two of our partners from Bennett Griffin.

What this means is that the advice and quality of service that clients receive in respect of financial advice will always be consistent with the quality of our own. The connection between the two firms also enables a holistic approach.

There is often a potential impact of financial arrangements on legal matters and vice versa. BG Wealth Ltd is now providing strategic advice to both private and commercial clients in the following areas:

- **Inheritance tax**
- **Wealth management**
- **Legacy investment**
- **Elderly client financial issues**
- **Pension consultancy**
- **Business financial planning**
- **Divorce settlements**

www.bgwealth.co.uk



Our Services

*Please take a look at this summary of the services provided by the private client team and if you would like to receive an information guide on any one of them, please don't hesitate to call **01903 229999** and ask to speak to a member of the BG Private Client Team.*

Thank you

- **Attorneyship**
Drafting for property and personal matters, registrations and administration
- **Care Homes**
Choice, funding options and contracts
- **Deputyships**
Applications, responsibilities and administration
- **Elderly Clients**
Advice and services
- **Equity Release**
Options and alternatives
- **Executorship**
The options, responsibilities and administration
- **Inheritance Tax**
Lifetime planning and will provisions
- **Probate**
Administration, Deeds of Variation, tax, contentious matters
- **Trusts and Tax**
Lifetime and will trusts, drafting discretionary, disabled, pilot or secret trusts, tax, discretionary decisions and administration
- **Wealth Planning**
Protecting and maximising family wealth
- **Wills**
Drafting individually tailored wills

Although this new service is not part of our legal practice and so the protection afforded our clients by the Law Society and the Solicitors Regulatory Authority is not available, the appropriate protection is provided by the Financial Services Authority and Financial Services Compensation Scheme. No lawyer connected with Bennett Griffin provides services through BG Wealth Ltd as a practising lawyer regulated by the Solicitors Regulation Authority.

If you would like to arrange an informal introductory meeting with either **John Kelly** or **Andrew Melbourne** at BG Wealth Ltd to discuss your financial challenges or opportunities, please call **01903 229999** and ask to speak to a member of the BG Private Client Team.

Generally there is no charge for an initial meeting.

Please call one of our specialist Private Client team if you would appreciate seeing how we can help you and your family - **01903 229999**

Testimonials

Please don't just take our word for it

Tania Clapham

"...The death of our dear brother has of course been very stressful, but without your efficient help we are sure it would have been much worse. We are both very grateful!"

Greg Woods

"I would like to express to you sincere thanks on behalf of our company - you have made this all very easy for us with the courteous and efficient manner in which you have dealt with everything."

Ian Macara

"Efficiency, kindness and courtesy in a friendly environment is what I received from Mr Ian Macara."

Jo Ostrom

"Professional, courtesy, patience, understanding, availability by phone, friendly and respectful. Thank you Jo for everything."

Katie Haffenden

"... I got courtesy, understanding and good service. Thank you all."

Ian Peterkin

"I would like to take this opportunity to thank you for everything you have done... you have been great"

Tricia Stephenson

"... we constantly recommend you to friends and business contacts"

Jackie Mensah

"A very big thank you for all your efforts on my behalf over the last few years. Take care and keep up the good work"

Jackie Gifford

"Prompt, transparent and honest service. Thank you"

Stephen Hollamby

A reliable friendly service - which we received throughout - Thank you!"

Have your say

We would love to hear from you with your thoughts about the content and style of The Brief and where you believe further improvements could be made. The best suggestion in our opinion will win a voucher for £25 to spend at Roundstone Garden Centre in Worthing.



Did you know?

That the life expectancy of a child in 1901 was 45 for a boy and 49 for a girl? Thankfully, in 2007 the life expectancy had increased to 77 and 81 1/2 respectively



bennettgriffin
SOLICITORS AND NOTARIES

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BN12 5DR Telephone: 01903 706951

Legal summaries provided in this newsletter are not a definitive statement of the law in any area. Advice should be sought from a solicitor in respect of any information that affects any individual matter with which you may be concerned.

BREAKING NEWS!

Bennett Griffin win at The Worthing First Business Awards for Customer Care Award

We are family...



If you are ever in need of constructive, experienced and helpful advice on family matters, please don't hesitate to speak to our family law experts namely: **Stephen Hollamby**, **Jackie Mensah** and **Jackie Gifford**. Stephen, a Partner at Bennett Griffin, has an unrivalled knowledge of

adoption and childcare work.

He is regularly instructed by Court-appointed guardians to represent children in complex and lengthy cases. **Jackie Mensah**, an Associate Solicitor, has specialised in all areas of family work at Bennett Griffin since 2004.

Jackie Gifford is a Fellow of the Institute of Legal Executives and a qualified mediator. This makes her one of only a handful of in-house mediators in West Sussex. Both Jackies subscribe to the principles of **Resolution**, an organisation that promotes the use of skill and good conduct in family law.

Between them, both Jackies have many years of family law experience that includes tackling highly sensitive and entrenched children's matters and fighting financial claims in high net worth divorce cases.

Whether you need constructive advice on how to protect your assets from future claims with the assistance of skilfully drafted living together agreements, prenuptial and postnuptial agreements or you need legal help in separation, divorce and mediation please don't hesitate to contact any member of the **Family team** for the best possible legal advice:

Stephen Hollamby 01903 229907
Jackie Mensah 01903 229938
Jackie Gifford 01903 229903

Please call one of our specialist Private Client team if you would appreciate seeing how we can help you and your family - **01903 229999**