



QUEEN'S
UNIVERSITY
BELFAST

INSTITUTE OF
PROFESSIONAL
LEGAL STUDIES

WILL PREPARATION: NORTHERN IRELAND LAW AND PRACTICE

SHAPING
A BETTER
WORLD
SINCE 1845

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WHO SHOULD ATTEND?

The course is aimed primarily at solicitors. It will also be of benefit to barristers with a practice in Chancery or Probate and any professional who works in the administration of estates. Experienced legal executives would also benefit from the course.

MODULE ONE - KNOWING THE LAW

This initial module will comprise an overview of succession law. The module will consider the legal principles relevant to the execution and drafting of wills as well as those related principles that govern administration of estates. It will include some lesser known areas including miscellaneous equitable doctrines which present traps for the unwary.

MODULE TWO - THE PROFESSIONAL WILL-DRAFTER'S DUTY OF CARE

The lot of the professional will drafter has changed beyond recognition in the last quarter of a century. This module will chart the main testamentary negligence decisions and what they mean for the busy practitioner. This will include consideration of the mental elements: Testamentary Capacity, Knowledge and Approval, Undue Influence, Fraudulent Calumny and Minimising Future Disputes. Consideration will also be given to the importance of clarifying the retainer, drafting client care letters and what makes a good attendance note.

MODULE THREE - THE ANATOMY OF A TYPICAL WILL: THE TOP 10 MISTAKES

This module will focus on the basic features of a will, including:

- Introduction
- Revocation
- Appointment of executors/guardians
- Different types of gifts
- Misdescribed charities
- Administrative provisions
- Class gifts

The module will also look at avoiding partial intestacies, dealing with the burden of liabilities including IHT and words and phrases to avoid.

MODULE FOUR - TAKING, EVALUATING AND IMPLEMENTING INSTRUCTIONS - SPECIFIC CASE STUDIES

In this session we will focus on specific case studies where things have gone wrong!

We will look more closely at:

- Drafting rights of residence
- Dealing with blended families
- Issues that can arise with the transferable nil rate bands
- Wills for businesses

MODULE FIVE - DEALING WITH POST-DEATH ISSUES

This module will consider how a lawyer deals with some common post death issues relating to wills.

- The custody of the original will
- Who exactly is your client?
- The solicitor as executor – when to go and when to insist on staying
- Conflict between executors
- Dealing with validity challenges - Larke v Nugus
- How to spot conflicts of interests early
- How to deal with mistakes

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THIS COURSE WILL BE DELIVERED BY

Sheena Grattan, Barrister at Law TEP



Sheena Grattan TEP is a Practice Fellow in the School of Law, Queen's University Belfast. She also has over 30 years' experience of succession law as a solicitor, and latterly 24 years as a Chancery Barrister at the Northern Ireland Bar. She is also a former Senior Lecturer in the School of Law at Queen's.

In both her former Bar career and research work she specialises in all aspects of succession law and trusts and is the author of various books, texts and articles (ranging from those in peer reviewed international journals to user-friendly guides for a lay readership). She is a founding member of the Northern Ireland Branch of the Society of Trust and Estate Practitioners (STEP), she was its chair 2018 to 2022, and continues to contribute as a committee member. She is on the editorial panel of both Folio and the Journal of Elder Law and Capacity, and has been the examiner of both legal components of the STEP NI Diploma.



Course Details

VENUE

Institute of Professional Legal Studies, Queen's University Belfast, 10 Lennoxvale, Belfast, BT9 5BY

DATES

Wednesday 17th April
Wednesday 24th April
Wednesday 8th May
Wednesday 22nd May
Wednesday 29th May

Each day the sessions will be from 10.00am-1.00pm with refreshments available from 9.30am.

CPD

Time spent by Solicitors and Barristers attending lectures and workshops in person or completing these via e-learning as part of this course can be claimed towards your annual CPD requirement. Attendance at this course will cover 15 hours of group study CPD.

FEES and REGISTRATION

£600

This is a standalone module that is worth 20 CAT points and will be delivered over a three month period. It is delivered on a credit earning non-graduating basis. Elements of the course will be delivered through Queen's University's online learning system which participants will be registered on.

In order to successfully pass the course there will be a requirement to complete some formal assignments through the electronic learning platform.

Applicants will be considered on a first-come first-served basis. Spaces are limited on the course and therefore you should register and pay as soon as possible by visiting our website at <https://www.qub.ac.uk/schools/InstituteofProfessionalLegalStudies/CPDCourses/>



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How to get more information

Visit our website for the latest availability, dates and fees:

www.qub.ac.uk/schools/InstituteofProfessionalLegalStudies/ or contact us on **028 9097 5699**

or e-mail: **Claire Armstrong** on c.a.armstrong@qub.ac.uk

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