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chancery
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Raises the Bar in Chancery & Commercial

Serle Court

6th International Trusts and Commercial Litigation Conference 2023

WHEN

Monday, 6 November 2023
8.30 - 17.00

WHERE

Rainbow Room
Rockefeller Center
30 Rockefeller Plaza
New York
NY 10112

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HEREFORD Litigation

Hereford Litigation, the proud sponsor of the 6th International Trusts & Commercial Litigation Conference in New York, is a leading force in the legal industry known for its unwavering commitment to excellence and innovation. With a stellar reputation forged over decades of legal expertise, Hereford Litigation has established itself as a trusted partner for clients navigating complex commercial disputes and trust-related matters worldwide. The company's dedication to providing top-tier legal services and its track record of achieving favorable outcomes have earned it the respect and admiration of peers and clients alike.

At the heart of Hereford Litigation's success is a team of highly skilled and seasoned attorneys who bring a wealth of knowledge and a deep understanding of the intricacies of litigation and trust law to every case. Their client-centric approach, coupled with a relentless pursuit of justice, sets Hereford Litigation apart as an industry leader. Through their sponsorship of events like the 6th International Trusts & Commercial Litigation Conference, Hereford Litigation continues to demonstrate its commitment to fostering dialogue, sharing insights, and driving excellence in the legal community, making them an invaluable contributor to the advancement of the field.

Members of the Hereford team, Edward Grundy (Managing Partner), Ben Mays (Partner) and Elly Brindle (Partner) are attending the conference and look forward to meeting the conference delegates.



Edward Grundy



Ben Mays



Elly Brindle

8.30 - 9.15	Registration
9.15 - 9.30	Introductory remarks: Elizabeth Jones KC (<i>Conference Chair</i>)
9.30 - 10.30	Panel Session: Around the World - how key jurisdictions are approaching topical issues Richard Wilson KC , Joshua Rubenstein (Katten Muchin Rosenman), Elliott Phillips (Signature Litigation), Fozeia Rana-Fahy (MJM Barristers & Attorneys), Sara-Jane Knock (Withersworldwide)
10.30 - 11.15	Panel Session: Alternatives: Arbitration, ADR, funding John Machell KC, Ruth Jordan , Alex Hall Taylor KC (Carey Olsen), Ben Mays (Hereford Litigation)
11.15 - 11.35	Coffee break
11.35 - 12.20	Panel Session: Conflicted out: fiduciary loyalty and the independence imperative Dan McCourt Fritz KC, Amy Proferes , Toby Graham (Farrer & Co), Andrew Peedom (Collas Crill)
12.20 - 13.15	A. Commercial Breakout Session: <i>"I'm a shareholder, get me out of here"</i> – the latest trends and troubles in shareholder disputes Timothy Collingwood KC, Gareth Tilley , Nicholas Brookes (Ogier), Tom Bolam (Fladgate) B. Trusts Breakout Session: <i>"No surrender"</i> – does Bruce Springsteen have the right idea when it comes to blessing applications? Harry Martin, Gregor Hogan , Richard Holden (Walkers), James Lister (Stevens & Bolton)
13.15 - 14.15	Lunch
14.15 - 15.15	Panel Session: Maximising recovery in cross-border claims Prof. Jonathan Harris KC (Hon.) , Jonathan Tickner (Peters & Peters), Prof. Linda Silberman (NYU), Ann Gittleman (Kroll)
15.15 - 15.35	Tea break
15.35 - 16.00	Juniors' Session: <i>"Hidden Gems"</i> - the most important cases you may never have heard of... Max Marenbon, Andrew Gurr, Stefano Braschi, Ryan Tang
16.00 - 16.45	Panel Session: Problem asset classes: issues for litigators and trustees in real estate, art and crypto Michael Walsh, Stephanie Wickenden , Stephen D. Palley (Brown Rudnick), Stella Mitchell-Voisin (Summit Trust International SA)
16.45 - 17.00	Closing remarks: Elizabeth Jones KC (<i>Conference Chair</i>)
From 19:30	Drinks reception at The Skylark, 200 W 39th St, New York, NY 10018



Elizabeth Jones KC - Chair

Ranked in band 1 in all of Commercial Dispute Resolution, Commercial Chancery, Traditional Chancery, Offshore and Trusts by Chambers and Partners, Liz's practice sits firmly where commercial litigation, fraud and private client meet. Most of Liz's cases involve several jurisdictions; she frequently works in the Channel Islands and is called in the BVI, and she is currently running a case which spans Kentucky, BVI, New Zealand and Australia as well as the UK. Liz is noted by clients and directories for her highly persuasive advocacy and presence in court, her attention to detail and her ability to master and control very large scale litigation.



Prof. Jonathan Harris KC (Hon.)

Jonathan has a pre-eminent reputation in the field of private international law and is general editor (with Lord Collins) of the leading work, *Dicey, Morris and Collins, The Conflict of Laws* (16th edition, 2022). He specialises in cross-border commercial and chancery litigation (particularly disputes raising issues of jurisdiction, anti-suit injunctions, recognition and enforcement of foreign judgments and choice of law). He also specialises in offshore litigation and has drafted firewall legislation for a number of jurisdictions (including BVI and Gibraltar). He has appeared in numerous leading cases, including in the Supreme Court and Privy Council. He is co-author of *Underhill and Hayton, Law of Trusts and Trustees* (20th edition, 2022). He acted as legal advisor to the Ministry of Justice on the EU Succession Regulation negotiations. He has also given expert evidence in numerous cases around the world. Legal directories describe him as "absolutely fabulous" and as "one of the world's leading authorities on cross-border jurisdiction issues". He is also part-time Professor of International Commercial Law at King's College, London.



John Machell KC

John has a broad commercial chancery practice, and particular experience of large-scale litigation involving trusts, fiduciary duties, and fraud and trusts, particularly with an international dimension. John is regarded as one of the leading partnership and LLP silks and has experience of a wide range of both contentious and non-contentious matters across the whole range of business sectors. A large part of his work involves issues arising from the use of partnerships and LLPs in hedge fund and private equity structures; in international commercial group structures; and as part of wealth planning strategies. A substantial part of John's practice relates to trusts, mostly offshore, and he has appeared in the Grand Court in Cayman on a number of occasions in the last few years.



Timothy Collingwood KC

Tim has a broad commercial and chancery practice, with a particular emphasis on litigation concerning issues in respect of commercial agreements and company, insolvency and international trusts matters. The directories recognise him as a leading practitioner in these fields. He has extensive experience of claims concerning breaches of duty, in particular in respect of directors or trustees and frequently involving allegations of fraud, and of shareholder disputes. He acts in cases across numerous jurisdictions, including BVI, Cayman and the Channel Islands. He is one of the contributors to *Minority Shareholders: Law, Practice and Procedure* (7th edition forthcoming).



Richard Wilson KC

Richard has a practice encompassing litigation, drafting and advisory work across a wide range of traditional and commercial chancery, with a strong emphasis on trusts and probate (both contentious and non-contentious), related company and partnership law, claims under the Inheritance (Provision for Family and Dependents) Act 1975, tax, professional negligence and civil fraud.



Dan McCourt Fritz KC

Dan was among the very first of his cohort to take silk, at only 15 years' call - an achievement made more remarkable by the fact that Dan practises across a wide range of heavyweight chancery commercial specialisms. His appointment as a KC represented a natural progression from his position as one of the most sought after and highly rated chancery commercial juniors at the Bar (most recently recognised by his 2022 shortlisting by Legal 500 for chancery junior of the year). Dan is recognised by the main directories as a leading practitioner in Civil Fraud, Offshore, Chancery Commercial, Commercial Disputes and Company and Partnership Law.



Ruth Jordan

Described in Chambers and Partners and the Legal 500 (Offshore and Insolvency) as “straight talking, practical and commercial” as well as “creative and industrious” and with “huge technical expertise”. Ruth has 20 years experience in domestic and offshore commercial, trusts, tax, charities and insolvency litigation. In addition to her private practice, she acts for the UK government in tax, trusts and insolvency matters. In this capacity, she appeared in *Pitt v Holt* and is currently instructed on the trusts aspects of a large number of tax appeals relating to the validity of remuneration trust tax avoidance schemes. Ruth is also frequently instructed to advise and act in relation to judicial review challenges to large-scale developments and infrastructure projects in The Bahamas and in other administrative, constitutional and commercial matters including arbitrations. She was called to the Bahamas Bar in 2021 to challenge oil exploration licences granted to Bahamas Petroleum Co Plc and acted in a recent challenge in the Privy Council to security for costs orders in public interest litigation.



Michael Walsh

“Very smart, commercial and pragmatic. His advocacy is incredibly impressive, often outshining KCs. A real pleasure to work with.” Legal 500 2024. Michael is a highly sought after senior junior specialising in property, commercial chancery, civil fraud and professional liability. Known for his extensive trial experience, strategic focus and excellent cross-examination, clients have told Legal 500: ‘Michael is a phenomenal property lawyer who understands not only the academic intricacy of property law, but how it works and can be made to work in practice for his clients’.



Gareth Tilley

Gareth’s practice focuses on fraud, and breakdowns within long-term business and personal relationships. This covers misrepresentation, breach of fiduciary duty, breach of confidence, employee competition, breach of contract, shareholder disputes, trust claims, asset tracing, proprietary estoppel claims, unjust enrichment, and accessorial liability, plus associated interlocutory and enforcement matters such as freezing injunctions and committal applications. Gareth also acts in cases of professional negligence, insolvency, and regulatory/disciplinary matters, particularly where they touch on the above areas.



Amy Proferes

Amy practises across various areas within both traditional and commercial Chancery, including company, wills and trusts, property, commercial litigation, and professional negligence. The majority of her work is unled, and often involves cases where multiple practice areas overlap.



Harry Martin

Harry has a busy junior practice specialising in Chancery, Commercial Chancery and Art and Cultural Property work. He advises in relation to contentious and non-contentious matters, both in England & Wales and in other jurisdictions. Harry is ranked as a leading barrister in the Chambers UK Bar and Chambers High Net Worth guides, which describe him as “a rising star”, and “very bright and commercial in his advice”. In 2019 he received the “star junior” award at the Chambers High Net Worth Awards.



Stephanie Wickenden

Stephanie specialises in Intellectual Property, Art and Media law. She also accepts instructions on broader commercial issues pertaining to the creative and technology sectors, such as contractual and tortious IT disputes or advice on IP transactions and licensing. A significant proportion of her practice involves an international element and she has experience in cases with disputed jurisdiction, foreign law, and service and enforcement out of the jurisdiction. Her background in art, combined with her expertise in IP, commercial and private international law, means she is uniquely placed to advise clients across a broad range of contentious or non-contentious matters relating to art and cultural property.



Gregor Hogan

Gregor has a busy Chancery commercial practice with a particular interest in commercial litigation, contentious trusts and probate (onshore and offshore), trusts and company issues in financial remedy proceedings, and civil fraud. Alongside his practice in London, Gregor is called to the DIFC Bar, where he regularly appears unled on substantial jurisdiction and enforcement challenges, and to the BVI Bar. He is ranked as a Rising Star in Trusts and Probate as well in Civil Fraud in the Legal 500 and in Chambers Global and the Legal 500 EMEA for his work in the UAE. Gregor has acted for a broad range of clients, including multinational companies, insurers, high net worth individuals, fiduciaries and charities. He is a contributing author to the DIFC Courts Practice and an Editor of Tudor on Charities.



Stefano Braschi

Stefano joined Serle Court a year ago, after successfully completing his pupillage under the supervision of Constance McDonnell KC, Matthew Morrison, Dan McCourt Fritz KC and Gareth Tilley. He has been instructed as sole counsel on applications in the High Court (ICC) and County Court, as well as assisting more senior members on various cases, including *easyGroup v Easy Live Auction* [2022] EWHC 327 (Ch). Stefano is developing a broad practice in many of Chambers' core areas and is currently undertaking the Postgraduate Diploma in Intellectual Property Law and Practice at the University of Oxford. Before coming to the Bar, Stefano studied History at Yale University and trained as an actor at the London Academy of Music and Dramatic Art. He worked as a professional actor for over ten years, performing on screen and stage, including on London's West End and in New York.



Max Marenbon

Max is a commercial chancery junior with a particular focus on civil fraud, company and insolvency disputes. He appears in some of today's most high-profile commercial litigation and in precedent-setting commercial and chancery cases. Before transferring to the Bar, Max qualified as a solicitor at a leading City firm, was Judicial Assistant to Lord Wilson at the Supreme Court of the United Kingdom, and served as a Senior Researcher at the Law Commission of England and Wales. In his spare time he enjoys cooking, playing tennis and the Mediterranean climate (separately or in combination).



Ryan Tang

Ryan is developing a broad commercial chancery practice in line with Chambers' core practice areas, with a particular interest in civil fraud and offshore trusts. He is also building up a practice in intellectual property and group litigation and has received instructions in these areas since commencing practice. Ryan previously worked as an associate in Slaughter and May in its competition department before joining Serle Court.



Andrew Gurr

Andrew has a busy Commercial Chancery practice across Chambers' core areas, with interests in civil fraud and asset tracing, offshore and domestic trusts litigation, matrimonial finance, insolvency, company, and property law. Andrew particularly welcomes instructions which involve legal or factual complexity, interim remedies and allegations of fraud.

**Joshua Rubenstein | *Katten Muchin Rosenman***

In his widely respected practice, Joshua Rubenstein, national chair of the firm's Private Wealth practice, brings a variety of important services under one roof for high-net-worth individuals. He offers integrated planning, administration and litigation counseling for individuals, their estates and their businesses, all of it designed to preserve wealth over generations. His advice stretches as far as his clients' financial interests – locally, nationally and globally.

**Sara-Jane Knock | *Withersworldwide***

Sara-Jane is a partner in the litigation and arbitration team. Head of the Withers BVI office, Sara-Jane is recognised by Chambers Global and Legal 500 BVI as a leader in her field, advising on a wide range of matters from commercial, contractual and finance disputes to insolvency, fraud and asset tracing. Sara-Jane also advises on probate and trust matters, both contentious and non-contentious. Working together with her colleagues in other Withers' offices around the world, Sara-Jane strives to provide her clients with a dedicated global team, ready to tackle cross-border cases with local on-shore and offshore experience. She regularly acts for high-net-worth individuals (HNWIs), trustees, beneficiaries, insolvency practitioners, creditors, companies, directors, shareholders and officer holders, either directly or via intermediaries. She also works with key intermediaries, service providers and foreign lawyers in various jurisdictions to ensure a seamless service for her clients.

**Elliott Phillips | *Signature Litigation***

Elliott is the founding partner of Signature Litigation's practice on the Rock complementing his practice in London. Elliott specialising in contentious trusts and his practice extends to commercial litigation, civil fraud and insolvency. Elliott appears before all courts in Gibraltar and England, and he is ranked Band 1 in Chambers directories, he is described as "an outstanding practitioner and one of the best lawyers in Gibraltar." The Guide also highlights Elliott as "simply superb, a brilliant tactician and outstanding advocate, he leads his team with incredible skill and care". Elliott is also recognised by the Private Client Global Elite and as one of the Top 100 Trust Litigators and Top 35 Private Client Litigators 2020-2023. From 2015-2023, Elliott was also an MP in Gibraltar and served as HM Leader of the Opposition and Shadow Minister for Justice. Elliott also served as Shadow Minister for Health during the C-19 pandemic.

**Alex Hall-Taylor KC | *Carey Olsen***

Alex Hall Taylor is King's Counsel, Managing Partner of Carey Olsen's BVI office and head of its global BVI Litigation and Insolvency team of 8 partners and 17 fee earners. With 20 years' practising in Lincoln's Inn before moving to BVI, Alex has over 25 years' court experience in commercial and contentious trusts litigation, insolvency, and dispute resolution across a broad range of Court work, insolvency and restructurings, arbitrations and mediations. He has extensive interlocutory, trial and appellate advocacy experience including before the Privy Council. His practice is principally contentious, involving regular advocacy before the BVI Commercial Court and ECSC Court of Appeal, tactical advice and strategic expertise in high value, complex, document heavy multi-jurisdictional matters. He is a CEDR-accredited mediator. Alex is ranked as a leading and band 1 individual in BVI dispute resolution in the most recent editions of Legal 500 and Chambers and Partners Global, where he is said to be 'formidable', 'an incredible advocate and legal strategist' and to stand out for 'his knowledge, experience and responsiveness'.

**Fozeia Rana-Fahy | *MJM Barristers & Attorneys***

Fozeia acts for both international and local clients in a wide range of complex disputes including corporate, banking, insurance, employment/immigration, insolvency and high-value trust litigation cases. She routinely advises and give presentations on topical issues for the banking, insurance, trust and private client sectors in Bermuda. She also has a successful mediation practice and is the leader of the Bermuda Business Development Agency Trust & Private Client Group Executive. Fozeia was in private practice in London (UK) from 2000 to 2004 at Lovells and at Elborne Mitchell. Prior to joining MJM in 2009, she was an associate at Appleby from 2005 to 2009.

**Ben Mays | *Hereford Litigation***

Ben Mays is a partner at Hereford Litigation. Hereford funds litigation and special situations globally. As a litigator in private practice, Ben was described by Chambers Global as "an outstanding strategic thinker with a great tactical mind". Ben spent the first six years of his career with Travers Smith in London. He moved offshore in 2003 where he worked with the leading offshore firms of Maples in the Cayman Islands and the BVI, and subsequently Carey Olsen where he set up and ran that firm's successful and highly regarded BVI litigation and insolvency team. He was involved in many of the most high-profile and complex insolvencies and litigation cases in the Cayman Islands and the BVI. Ben is an experienced advocate having appeared regularly at first instance and Court of Appeal in both the BVI and Cayman Islands.



Toby Graham | *Farrer & Co*

Toby specialises in contentious trusts and estates, usually of high-value with international elements. He has recently been involved in trust disputes before courts in England, The Bahamas, Bermuda, BVI, Cayman, Cyprus, Guernsey, Jersey, New Zealand, Singapore, Switzerland and TCI. Head of Farrer & Co's contentious trusts and estates group, Toby has experience of a broad range of disputes such as third party claims; validity issues; breach of trust; Hastings Bass; applications for approval under VTA; disputes over investment performance; Inheritance (Provision for Family and Dependants) Act 1975 and validity challenged to wills. Toby works with an international network of experienced advisers, ensuring his clients receive first class advice within their jurisdiction. Toby qualified as a solicitor in 1992 and joined Farrer & Co in 2007.



Andrew Peedom | *Collas Crill*

Andrew is Counsel with Collas Crill in its International Private Client & Trusts team in the Cayman Islands. He has extensive experience in complex commercial litigation, with a focus on contentious and non-contentious trust and estate disputes, many of which have a multi-jurisdictional element. He regularly acts for trustees, settlors, protectors, enforcers and beneficiaries and he also advises on regulatory matters. He has worked offshore since 2010, first in Guernsey, where he was heavily involved in one of the largest trust disputes in the Channel Islands, before moving to the Cayman Islands in late 2016. He has been involved in many of the trust disputes in the Cayman Islands courts in recent years. Andrew is a member of STEP and the STEP Council for the Cayman Islands' branch.



Nicholas Brookes | *Ogier*

Nick is BVI office head of Dispute Resolution. He is a barrister with more than a decade's experience in dispute resolution and BVI litigation, in particular in director and shareholder disputes, trust and estates litigation, insolvency, fraud and asset tracing, and general corporate and commercial disputes. He formerly worked as a commercial and chancery barrister in London. Nick has worked on and appeared in some of the largest high profile and high value litigation in the BVI with Ogier since 2014.



Tom Bolam | *Fladgate*

Tom is partner in the Dispute Resolution department at Fladgate LLP. His practice focusses on commercial and business disputes. Tom has particular experience and expertise dealing with shareholder disputes, fraud matters, insolvency claims and disputes relating to international supply and distribution agreements. Tom also advises private clients on defamation, contentious trust and contentious probate disputes. Tom is ranked as a leading lawyer in both Legal 500 and Chambers.



Richard Holden | *Walkers*

Richard Holden is a partner in Walkers' Jersey Insolvency & Dispute Resolution Practice Group, focusing on complex trusts matters and commercial disputes. He is a seasoned trial and appellate advocate with more than 25 years' experience having practised as a Barrister in London before moving offshore, and is admitted in Jersey, England & Wales, New Zealand and New South Wales. Alongside practising, he has also taught law in Jersey, England and New Zealand, including as a Visiting Professor of Trusts Law at the Institute of Law in Jersey. He has a wide practice, with a focus on complex contentious trusts matters and disputes relating to other asset holding structures, and fraud, asset-tracing and enforcement. He is also expert in the application of traditional Jersey customary law to modern commercial disputes.



James Lister | *Stevens & Bolton*

James Lister is a partner at Stevens & Bolton, specialising in private wealth disputes, dealing with trust, estate and succession matters within the UK and internationally. James also deals with disputes where trusts and private wealth issues are involved in wider commercial disputes, such as fraud and asset recovery. He acts predominately for private clients or for those who advise private clients, such as corporate trustees, private banks and other law firms. James has been named as a "Rising Leader" in Legal Week's Private Client Global Elite directory 2023 and "One to Watch" for the last four years. James has been listed in the Citywealth "Top 100 Private Client Litigators List 2023" and is ranked as a "Top Recommended 2023 Contentious Tax & Trust Lawyer" in the Spears 500. He is ranked as a Band 1 individual in the Chambers HNW directory 2023 and as a "Next Generation Partner" in The Legal 500 2024. James is also co-chair of ConTrA, the Contentious Trusts Association



Jonathan Tickner | *Peters & Peters*

Jonathan is Peters & Peters' Head of Commercial Litigation and Civil Fraud. He specialises in large complex international and commercial disputes, civil fraud and asset recovery with ground-breaking experience in multi-jurisdictional emergency procedures. Jonathan also has extensive experience in large-scale competition follow-on damages claims, having acted for the Secretary of State for Health and Social Care for over 20 years in a significant number of large-scale damages, fraud and cartel claims. An experienced and skilled practitioner specialising in large complex commercial disputes, civil fraud and asset recovery and competition litigation damages cases, Jonathan has extensive experience in dealing with multi-jurisdictional emergency procedures, including asset freezing and search and seizure orders. Jonathan's work ranges from the conduct of internal investigations, the diversion of business opportunities and breaches of fiduciary duty to claims involving deceit, bribery and secret profits.



Prof. Linda Silberman | *NYU*

Professor Linda Silberman is the Clarence D. Ashley Emerita Professor of Law at New York University School of Law, where she is a long standing scholar and teacher in the fields of Civil Procedure, Comparative Procedure, Conflict of Laws, Transnational Litigation, and International Commercial Arbitration. Her articles have been cited in the Supreme Court of the United States, various other state and federal courts in the United States, and several foreign courts. Prior to joining the NYU faculty where she became the first female tenured law professor at the school, Professor Silberman practiced law in Chicago and then later served as Professor in Residence at the U.S. Department of Justice. She is the co-author of a leading civil procedure casebook and a comparative procedure book, and she has been an Adviser and Reporter for various transnational projects of the American Law Institute.



Stephen D. Palley | *Brown Rudnick*

Stephen Palley is a litigation partner and co-chair of Brown Rudnick's Digital Commerce group. Stephen is a seasoned litigator with over 20 years of extensive courtroom experience litigating and trying complex commercial matters. He has deep technical and U.S. regulatory knowledge, particularly in the digital asset space, and assists clients working on the frontiers of technology, including on deal work for blockchain and other technology enterprises. He is also a fellow of the American College of Coverage Lawyers, and uses his insurance knowledge and experience to advise clients on insurance coverage matters related to technology and other risks. Stephen has written extensively and been quoted widely on legal issues arising from the use of Blockchain technology, with appearances in both print and television media. He is an editor of the International Journal of Blockchain Law (IJBL), a law journal launched in November 2021 to help non-legal communities better understand Blockchain applications and digital assets.



Ann Gittleman | *Kroll*

Ann Gittleman is a Managing Director in Kroll's Expert Services practice based in NYC. Ann is a CPA, certified in financial forensics, accredited in business valuation, a certified insolvency restructuring advisor and an attorney. Ann frequently works on complex litigation and arbitration cases where the claims in many instances are in the hundreds of millions of dollars. Ann has been retained as an expert in cases involving asset recovery, cross-border claims, solvency assessments, valuation, forensic investigations, forensic accounting, GAAP, IFRS, GAAS and related accounting issues as well as bankruptcy investigations and related expert assistance. Ann joined Kroll with the acquisition of Kinetic Partners where she was a director and co-head of the New York Forensic & Dispute Services practice.



Stella Mitchell-Voisin | *Summit Trust International SA*

Stella Mitchell-Voisin is the Chief Executive Officer of Summit Trust International SA in Geneva and one of the founders of the company. Stella began her career with a major international banking group as a graduate trainee in 1991. She quickly moved in to the private banking and trust area and worked in Jersey before moving to Geneva in 1996. She has a wide range of experience of trust and company management including fine art, bloodstock, commercial and residential property, private equity, international portfolio management and private trust companies as well as contentious trust issues. Stella is a graduate of King's College London, LLB (Hons), an associate of the Institute of Financial Services, a member of the IOD and a member of STEP. She is a regular speaker at international trust conferences and acts as a tutor for Central Law Training in respect of the STEP diploma courses. Stella appears on the Citywealth leaders list. Stella is a British citizen and speaks English and French.



Kathryn Purkis | *Chambers Director*

Kathryn has been Chambers Director at Serle Court since April 2022. She is a former practising member of Chambers and Jersey Advocate with particular expertise in contentious trusts. As Chambers Director she has ultimate responsibility for the strategic direction of Chambers, business and practice development, management of staff and the overall operations of the set.



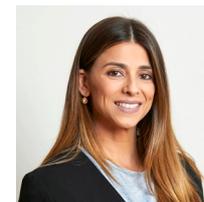
Charlotte Davidson | *Business Development Director*

Charlotte Davidson is Business Development Director at Serle Court. Charlotte joined Serle Court in 2013, took up the role of Business Development Manager between 2018-2022, and was promoted to Business Development Director in January 2023. Charlotte oversees client relationship management for chambers and is responsible for devising and implementing chambers' business development strategy. Charlotte works closely with Chambers Director, Kathryn Purkis, the Marketing Committee, and the Practice Directors on the creation and implementation of the annual BD plan. She is responsible for seeking new business opportunities, growing relationships for chambers, and analysing data. Charlotte works together with the practice directors and marketing team in order to plan business development activities and establish client care for chambers in all areas of practice – building new relationships and cross-selling services. She also oversees the directories process, Serle Court's PR & communications programme, and the compilation of key conference programmes.



Nicholas Hockney | *Practice Director*

Nick Joined Serle Court as a result of the merger between Serle Court and 1 Hare Court in 2000. Nick started as a junior clerk in 1991, was promoted to Senior Clerk in 2006 and to Practice Director in 2023. Nick can advise on the full spectrum of client services with key responsibilities being the distribution of work, fee negotiation and developing the practices of members of chambers. He has excellent relationships with the listing departments in the High Court. In 2014, Nick was one of the first clerks to achieve the Level 5 diploma in Leadership and Management from the Institute of Leadership and Management.



Shana Garioch | *Marketing Manager*

Shana is responsible for managing the full marketing mix in chambers, and alongside the Chambers Director, Kathryn Purkis, and Business Development Director, Charlotte Davidson, implementing the chambers' business development and marketing strategy. Shana has worked in the industry for 12 years, bringing diverse and substantial marketing experience to chambers. She worked at one of the UK's leading planning sets, and a leading common law set, where she headed the marketing function. In her spare time, Shana likes to spend quality time with her two children and enjoys running and keeping fit.



Dan Wheeler | *Practice Director*

Dan joined Chambers in 2000, having previously worked at 1 Hare Court. He started as a Junior Clerk in 1999 and was promoted to First Junior Clerk in 2010, Team Leader in 2013, to Senior Clerk in 2018 and Practice Director in 2023. Dan is responsible for the management and development of members' practices, including diary management, work allocation, fee negotiation, business development, client relationship management, and the listing of cases at Court. Dan sits on Chambers' Management and Marketing Committee. In 2016, Dan completed the Level 5 Diploma in Leadership & Management with the Institute of Leadership & Management (ILM). Dan is also a member of the The Institute of Barristers' Clerks.



April Fisher | *Marketing Executive*

April first joined Serle Court in 2019 as Marketing Assistant where she assisted in the preparation of Serle Court's annual events, such as our Client Party and our 4th International Trusts and Commercial Litigation Conference in New York. Since then, April has worked at 25 Bedford Row, before re-joining Serle Court as Marketing Executive in June 2021. April assists both Charlotte and Shana, the Practice Management team and members of chambers to carry out planned marketing activity. Some of April's responsibilities include organising and delivering events and seminars, preparing newsletters, updating Chambers website and social media pages and producing branded marketing materials.

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Please share your thoughts and images on LinkedIn during the conference, using the conference hashtag **#SerleCourtNY2023**. Please tag Serle Court so that we can see your posts and react!

If you have any questions or queries throughout the day, our BD team would be happy to assist.

We hope you enjoy the conference!





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"Serle Court is highly renowned for its extensive expertise in offshore trust matters."

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"Serle Court is an excellent set with a roster of formidably intelligent, yet approachable and user-friendly barristers."

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