



City of London

ADVISING FAMILIES ACROSS GENERATIONS

The next meeting of the STEP City of London Branch and AGM will be held at on 10 June 2019, kindly hosted by Sarasin & Partners LLP at Juxon House, 100 St. Paul's Churchyard, London EC4M 8BU

Managing Family Disharmony

Please join us for a panel discussion exploring how to manage family disharmony, with a focus on family wealth (including structures and trusts) and succession challenges. We are delighted to have an expert panel who will offer insights from the perspective of a trusted adviser, a mediator and a dispute resolution specialist. Before the discussion we will hold the STEP City Branch AGM. The AGM Notices will be sent to Branch members separately.

Arrival from 6.00 pm

AGM: 6.15 – 6.30pm

Panel discussion: 6.30 – 7.30 pm

Refreshments served: 7.30 pm

Approximate end: 8.45 pm

Panel details:

Randal Dunluce – Partner, Private Clients, Sarasin & Partners LLP

Randal has over 25 years of investment experience and manages some of the firm's larger charity and private client portfolios, including many multi-generational families. Prior to Sarasin & Partners, Randal was at NCL Investments Limited. Randal is Chairman of the London Partners and was also responsible for setting up our Dublin office, which he continues to oversee.

Sam Longworth – Partner, Stewarts Law LLP

Sam is a leading lawyer in international, complex and high-value divorce and family law cases. He is recognised across the private wealth industries as a leader in his field. Sam is instructed by individuals, families, and trustees across the world to address issues arising from divorce, and to assist in the preparation of pre- and post-nuptial agreements. He also has extensive expertise in complex parental disputes, with a particular emphasis on international relocation.

Jennifer Haywood – Barrister, Serle Court Chambers

Jennifer has a broad commercial chancery practice encompassing litigation, drafting and advisory work across a wide range of traditional and commercial chancery. A CEDR accredited mediator, Jennifer has conducted more than 30 mediations, mostly in the areas of contested trusts and probate and Inheritance (Provision for Family and Dependents) Act 1975 and partnership/LLP. Jennifer also acts as an arbitrator and is a fellow of the Chartered Institute of Arbitrators.

Chair: Corinne Staves - Partner, Maurice Turnor Gardner LLP

Corinne advises on UK and international estate planning. She also advises on partnerships, limited partnerships and LLPs in relation to their use as professional practices and fund managers, in joint ventures and as family wealth planning vehicles.

If you would like to attend please reply by e-mail to Suzanne.Tomlin@penningtons.co.uk

A future meeting is planned for the evening of Monday 8 July. Details to follow.



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Whilst inevitably there are going to be occasions when last minute events prevent attendance, members are nonetheless requested, whenever possible, to give at least three days' notice of non-attendance to Suzanne Tomlin by telephone on 020 7457 3039, by fax on 020 7457 3240 or by e-mail to: Suzanne.Tomlin@penningtons.co.uk If a member wishes to send a substitute to a meeting, he or she should notify the name of the substitute.

The event is accredited by STEP for CPD purposes.

If this mailing is incorrectly addressed, please inform the City of London Branch Membership Secretary:
M K McMullen, BDO LLP, 150 Aldersgate Street, London EC1A 4AB
Telephone 020 7334 9191. Direct line 020 7651 1047. Fax 020 7651 1688.
E-mail mark.mcmullen@bdo.co.uk

For all other membership matters please contact STEP Head Office. E-mail step@step.org
Tel 020 3752 3700. Fax 020 7340 0501.

Data policy

As a valued member, student or friend of STEP City of London Branch, we would like, occasionally, to send you information and invite you to branch events. Additionally, event hosts and speakers will see your acceptance details for the purposes of organising the event (including size of room required, catering and security).

Together, we and STEP (The Society of Trust and Estate Practitioners, a company limited by guarantee incorporated in England and Wales. Registered number: 2632423. Registered Office: 3rd Floor, Artillery House, 11-19 Artillery Row, London, SW1P 1RT, UK) will need to process your data to do this, and so we want to highlight our privacy policy to you. We are processing your data on the basis that we have a "legitimate interest" in doing so, because you have expressed interest in attending our events, receiving useful information from us, and generally staying in touch. The policy can be found here <https://www.step.org/privacy-notice>

If you are happy with this, you don't need to do anything further. If you do not wish us to contact you in future, please e-mail Suzanne Tomlin, Branch Administrator, on Suzanne.Tomlin@Penningtons.co.uk