

Legal services for charities

May 2024



Hj

The numbers supporting
our success

100

Top 100 UK law firm with offices
in Cardiff, London, Manchester,
Southampton & Plymouth

19
60

Established practice
with more than 60 years'
experience and City-
quality lawyers



100

Partners

720

Staff members

Tier 1

Top ranked in
independent UK
legal directories

Looking after your legacy

Roman leads the private wealth disputes team at Hugh James and has built up considerable experience in the sector.



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I'm really proud to introduce Hugh James' dedicated Charities team. In this brochure you'll find more information about how we can help your charity and why Hugh James is best placed to look after your legacy.

As a top ranked, top 100 full-service firm with locations across England and Wales, we're able to offer each of our charity clients an expert, dedicated and personalised service at competitive rates to help you realise and maximise your legacy income as quickly as possible.

We provide no-nonsense, clear and pragmatic advice to ensure that any solution is tailored to your charity and case, including understanding the importance of specific charity considerations such as PR and the impact that this can have on future income. We also ensure that our clients are kept up to date every step of the way. We pride ourselves on looking at a matter from every possible angle.

Here at Hugh James we're also strong advocates of "putting your money where your mouth is" which is why we think it's really important to support charities both as a firm and by encouraging and facilitating our staff to support the charities and causes that mean something to them.

Please don't hesitate to get in touch with me, or any other member of the team, to discuss your queries.

"Can I just say how refreshing it is to work with a firm of solicitors who actively keep us in the loop with administration process – we are extremely grateful for your help!"

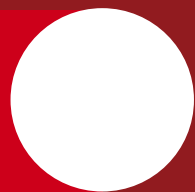
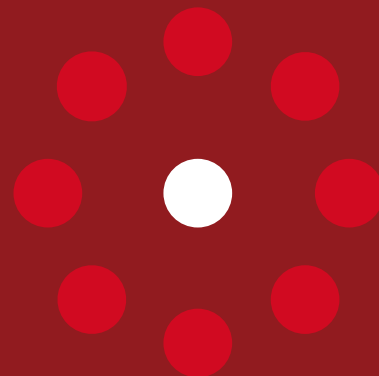
Legacy Management Officer,
Cancer Research UK



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When what's important needs protecting

Challenge accepted



How HJ Legacy can help

We know how increasingly vital legacy income is for charities, and how important it is to protect it – while navigating through the issues of risk, reputation, and regulation.

That's why we're committed to working with you; whether that's through tailored and bespoke training, drop-in clinics, legal support or just a forum to share ideas, we can help.

Why use us?

- Dedicated charities team backed by a full-service law firm
- ILM Corporate Partner
- Network of external industry professionals that offer additional support
- In-house training to Legacy teams
- Public relations, brand and intellectual property expertise
- Innovative and bespoke pricing



Legacy and Estate Administration Services

Our award-winning team is proud to provide a full legacy and estate administration service specifically tailored for charities with strict service level agreements and established processes.

Our legacy and estate administration service is offered on a national basis and is provided by a dedicated team of lawyers many of whom are STEP qualified.

The team has a longstanding track record of providing these services to both charities and other professional executors, including the trust corporations of High Street banks.

As a full service law firm we pride ourselves on being able to provide any legal service that professional executors may need, all under one roof.

We also provide outsourced legacy, estate and trust administration services through our trust corporation, Hugh James Trust Corporation.

Our service includes:

- Outsourced legacy administration
- Outsourced full estate administration on behalf of personal representatives
- Executorship services via our dedicated trust corporation – Hugh James Trust Corporation – either under a power of attorney or where the charity does not wish to
- Standalone extraction of grants of representation
- Facilitating nationwide asset valuations, management and sales including conveyancing of residential and commercial properties
- Appropriation of assets to mitigate tax
- Deeds of variation
- Trust advice and deed drafting
- Ongoing trust administration services
- Tax advice, including dealing with agricultural and business assets
- Dealing with overseas assets
- Nursing care cost recovery claims
- Managing business assets forming part of the estate
- Dealing with claims against or by an estate
- Clinical negligence and personal injury claims (for example if the deceased had ongoing claim of if they died as a result of an injury or negligence)

“A particularly strong reputation advising charities on legacy administration, as well as legacy disputes.”

Legacy Disputes

Our top-ranked team advises charities across the whole range of legacy, will and estate disputes both across England and Wales and internationally.

Our services include:

- Claim under the Inheritance (Provision for Family and Dependents) Act 1975
- Legacy disputes and will validity claims for lack of capacity, want of knowledge and approval, undue influence and/or forgery and fraud
- Disputes with executors/PRs/attorneys
- Claims concerning lifetime gifts or where funds have been misappropriated by a third party
- Claims in equity including proprietary estoppel, constructive and resulting trust claims
- Trust disputes
- Court of Protection and statutory will claims
- Lost will claims
- Legacy recovery services
- Cy-près scheme applications and advice
- Will construction and rectification claims

We also offer flexible fee solutions tailored to our charity clients' needs.



“The best contentious estates and trusts team in Wales. One of the top five in the West of England and capable of matching other national firms in heavier weight work.”



Unlocking a legacy gift

The Royal Welsh College of Music and Drama approached us and asked if we could help them as beneficiaries of Phoebe Phillips' will.

There was some confusion over the construction of the will and nothing had happened for many years, meaning that a potentially vital source of income had been locked up. Phoebe was devoted to the arts, and part of her wish was to fund students with their musical studies.

After engaging in discussions with the will trustees, we were able to unlock a part of Phoebe's legacy to the college to help create scholarships to the students – "The Phoebe Phillips Scholarship."



CASE STUDY

Royal Welsh College of Music and Drama



"We've been so fortunate to develop this partnership with Hugh James over a number of years, and we've benefitted enormously from their expertise".

Professor Helena Gaunt
Principal at RWCMD



Additional services to support you

We put everything into becoming a trusted advisor and a valued business partner for our clients. Here are some of our other services that you might like to know about.

Will writing

As one of the largest regulated providers of will-writing services in the UK we provide will writing services for charities, individuals and financial institutions across England and Wales and beyond. And, because we're regulated by the Solicitors Regulation Authority, your benefactors can be assured they're in safe hands. We offer will writing services tailored to your specific needs, including online, telephone or face-to-face appointments.

Charity Law and Governance

We help charities across the spectrum of corporate and governance matters. We advise on constitutional and regulatory issues including board and membership concerns, corporate governance reviews, providing or amending governance documents, policies and procedures and amending governing documents (including Charity Commission consent if required).

We are happy to provide training or other support on topical issues such as the duties of charity trustees/directors.

Employment and HR Services

We help charities across the spectrum of employment and human resources matters. Our Employment and HR team deliver astute expertise to ensure that your greatest asset doesn't turn into your worst nightmare. We work in partnership with clients to offer pragmatic solutions, minimise risk and help maximise human capital.

Property services

Charities often either own, occupy or are bequeathed land. Our Property team delivers focused strategic advice to a wide range of charity clients and we are often at the forefront of commercial property development.

We deliver a personal, cost-effective and partner led service and are valued for our blend of technical expertise, pragmatic advice and quality of service. Where disputes arise we work with our clients to develop a quick strategy to manage any issues and achieve the best possible outcome.

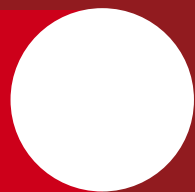
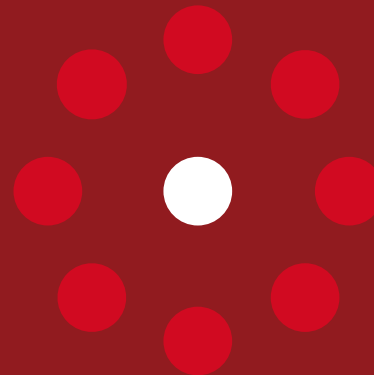
We act for a number of leading charities across England and Wales to manage and protect their property assets.



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When a dead end needs a way forward

Challenge accepted



The Hugh James difference

We are a leading, full-service UK law firm. Since our beginning, we have been led by the things that matter.

We care about fighting for the right outcomes. Solving the seemingly unsolvable. Protecting businesses, individuals and livelihoods. Supporting our people, our communities. Safeguarding our planet. Looking for a way forward? At Hugh James, challenges – of all sizes – are readily accepted.

Our law firm has always been guided by the idea that self-belief is just as important as skillset. Our pursuit of righting wrongs and protecting what's important keeps us driving forwards. It's in our roots! We won't stop until we find the answers; the outcomes that are needed.

We are focused on the work we do, the business we run, and our culture.

Our entrepreneurial spirit has taken us from humble beginnings to a strong presence across the UK with offices in Cardiff, London, Manchester, Southampton and Plymouth – servicing clients from businesses, individuals and banks to public sector organisations, property companies, education establishments and utilities providers.

Our collegiate culture, our forward-looking ethos, our values serve to make us bigger, better, bolder than ever before.



Our charity partnerships and corporate social responsibility

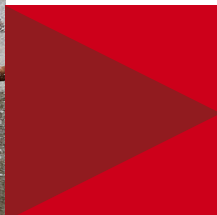
Our work with charities on a local and national level plays a huge part in our day-to-day lives.

We work with a large range of charities, some of which we support through fundraising and donations, and others we partner with where our areas of work cross paths.

Each year we raise money for our national charities in a variety of ways. Our headline events involve our staff and our clients as we know many of them share our passion and values when it comes to supporting and fundraising. We're committed to supporting the communities in which we live and work.

Our national charity partners

Our national partnership approach delivers a sustained support for our three nominated charities over a minimum two-year period. The current charities are [Ty Hafan](#), [Velindre Cancer Care](#), [Theodora Children's Charity](#) and [PAPYRUS](#). The national charities are chosen by our employees based at the Cardiff Headquarters and offices in England.



Hugh James also works with a broad range of charities whose work aligns with the support we give our clients. Many of our teams choose to support initiatives where their legal work aligns with the work of certain charities or support groups. They remind us why we have such a passion for what we do and inspire us to do more in support of the causes that matter most to them and their communities.

HJ community impact

We know our people are passionate about making an impact in the community. We give each of our employees two paid days per year to do something important to get involved in projects that make a positive difference in their communities with bona fide charitable organisations. We also seek out partnership opportunities to support our employee's wellbeing, taking care of their physical and mental health.

Additionally, we collaborate with charity foundations to support social issues and community development. [The Hugh James Emergency Fund](#) provides support for those facing the unexpected costs associated catastrophic injury. Our annual [pro bono scheme](#) with Cardiff University gives future generation lawyers access to the legal profession.

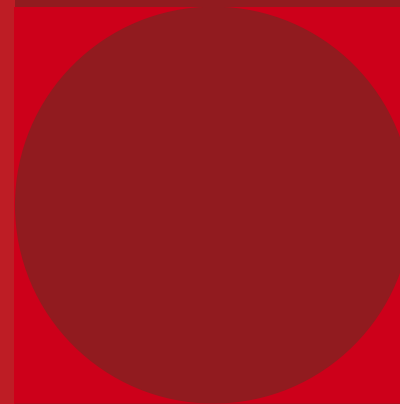
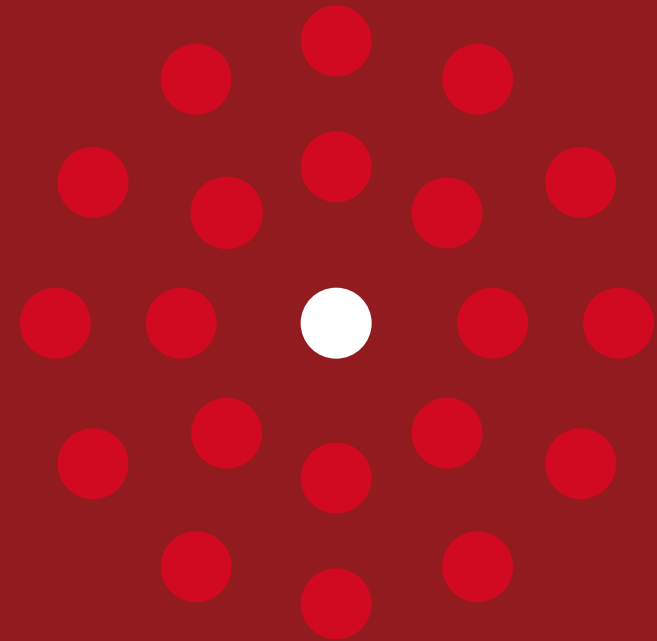
Get in touch

We would be delighted to discuss our services with you in further detail.

If you wish to discuss how we can help you, please get in touch.

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hughjames.com



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