# TRUSTS AND PRIVATE CLIENT DISPUTES

SPECIALISTS IN COMPLEX CROSS BORDER MATTERS

Our trust and private client disputes team are specialists in matters involving offshore and onshore trusts, estates, charities and mental capacity issues. We regularly act for institutional clients (including banks and trust companies), trustees, their insurers, beneficiaries as well as high net worth individuals and family offices.

Our experience covers pure advisory work and directions applications through to hostile actions pursuing or defending trustees in relation to claims for breach of trust and third party claims by or against trustees.

Our lawyers have many years of experience advising in these areas and our global reach enables us to service clients (including individuals) from across the world. Recent matters have involved clients in the United Kingdom, Eastern Europe, the Middle East and Asia.

Our offering is bolstered by the direct and immediate access to our in-house advocacy group which contains QCs with specific expertise in this field, and in addition we are able to draw upon our market-leading specialism in other practice areas across the firm (including regulatory, arbitration, insolvency, fraud and asset tracing, real estate, tax, anti-corruption, funds and asset management).

We also act for corporate trustees regarding pension/superannuation funds and managed investment scheme disputes, appearing both for and against trustees in relation to asset disputes, trustee duties/conflicts issues and compliance with statutory investment scheme regimes.

# RECENT EXPERIENCE

### A SPANISH FAMILY TRUST COMPANY

Advising in a disability claim in favour of a family to protect the high valuable companies, the heritage and the offshore trust of its members.

### AN INTERESTED PARTY

Advising in a contentious English probate matter which has involved issues with the named executor and related vexatious litigation all over the US as well as in England.  The current advice is of a technical nature involving the validity and interpretation of a will

### THE TRUSTEES OF A $150 MILLION JERSEY TRUST

Advising in connection with a restructuring to include the creation of two new trusts to plan for future beneficiaries (including charitable organisations) whilst combining the wishes of the main beneficiary with the trustees' fiduciary obligations and duties

### A CORPORATE TRUSTEE

Advising in relation to allegations concerning administration of private wealth assets and trustee’s duties

### CORPORATE TRUSTEE

Acting in relation to contested dispute between beneficiary noteholders under debenture deed and issues arising on trustee’s duties

### MAJOR PENSION/SUPERANNUATION TRUSTEE ENTITIES

Acting in relation to recovery of investments in unit trusts and trustee duties issues

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