



DEVON & SOMERSET
LAW SOCIETY

Autumn 2025

NEWSLETTER



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DEVON & SOMERSET
LAW SOCIETY

Raise the Bar. Enhance Your CX.

Exceptional legal service isn't just about outcomes—it's about how your clients feel throughout the journey. DASLS and insight6 are partnering to help you lead in Client Experience (CX).

Why Client Experience Matters

Clients expect fast, responsive, and human service, especially in high-stress situations. The programme gives you feedback and fresh insight to strengthen relationships, inspire loyalty, and sharpen your competitive edge.

What You'll Gain

- Real Insight: Understand how clients perceive your service.
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Get Involved

Scan the QR code to register your interest and raise your client experience standards today.

There's No Deadline—Just Opportunity

Take your moment to lead. Explore how your firm measures up, identify ways to stand out, and help set a new standard for the South West legal sector.

Chief Executive, DASLS

CX Director, insight6



Ready to raise the bar?
Scan the QR code or [click the link](#) to get involved.

CHIEF EXECUTIVE



Tony Steiner

The face of legal practice is changing with Artificial Intelligence developing at an exponential rate. The art of the possible was one of the topics at our recent Leadership & Management Conference when we were treated to an impressive presentation by Alastair Banks of Optix solutions about the latest developments with the promise of what is ahead. On Like it or not there are strategic decisions to be made and DASLS will endeavour to keep you up to date.

I am writing this just a couple of days after the MoJ leak around jury trials. If the MoJ carry out their proposed curbing of the right to jury trial it is unlikely ever to be recovered. I am interested to know what members think about this. Together with your Vice President Ben Darby, the Hon. Secretary Chris Hart and Board member Martin Laver, I recently attended a media training day coached by David 'Fitz' Fitzgerald at Fresh Air Studios in Plymouth. Issues such as this may give us the opportunity to speak out with our newly honed skills. This training is available to DASLS firms and is commended. If interested please get in touch.

Kelly and I were asked to join the Junior Lawyers Division at their winter Nutcracker Ball and what a great evening we had; I was probably the only grandparent in

the room and had my first silent disco experience. The JLD has recovered its strength through the fantastic efforts of the current team who we are delighted to be working closely with.



Some dates for your diary - from Friday 5th June we will be hosting the annual twin bars weekend culminating in the Legal Service at Exeter Cathedral. May I encourage you to support this weekend.

Hot on its heels is the Legal Awards on 18th June at the University and I am pleased to announce that Dean Dunham has accepted our invitation as our special guest speaker. Dean is a solicitor-advocate and qualified arbitrator, with in excess of 25 years' experience in the legal profession. During his career he has represented a wide range of clients, including celebrities such as Freddie Starr, Adam Ant and Jamie Vardy and several football clubs, including Tottenham Hotspur and Newcastle United. He is a regular broadcaster and hosts the 'Consumer Hour' on LBC.

I hope you enjoy this edition of the DASLS Newsletter. It is packed with news and information from around the region and from our many supporters.

DASLS has committed to Net Zero and will be launching its Green Badge Scheme in the new year. With that in mind I wish you a lovely Christmas and joyous 2026.

Tony

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All information in this newsletter is correct at the time of going to print. Devon and Somerset Law Society accept no responsibility for any inaccuracies in this publication.

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When you have finished with this newsletter please recycle it.

PRESIDENT'S REPORT



Pam Johns
President 2025/26

It's hard to believe that I'm already over 6 months into my Presidency. At times the AGM seems years ago and, at others, just the blink of an eye ago!

May brought my first awards dinner as a guest of Kent Law Society in a wonderful setting of Eastwell Manor, Ashford with the then Law Society President, Richard Aitkinson acting as Master of Ceremonies. My brother lives in Kent and was able to accompany me as my guest and also act as chauffeur for the evening. Thanks Andy.

June brought an awards dinner closer to home with the Cornwall Law Society, again in a wonderful setting, this time of Truro Cathedral. The President was supporting Cornwall Pride, and the evening was hosted superbly by two local drag queens and a lot of ladies had "frock envy" that night.

Just a week later was the full house at Devon and Somerset's Annual Awards Dinner in the Great Hall at Exeter University.

Great pre-dinner entertainment from the mirrored artists and a wonderful guest speaker, Penny Mallory. I was the Vice-President that evening, as the immediate past President, Stephen Forsey, is President that night and hosts the awards. That will be my privilege in 2026!

Early June also brought my first time having to chair the Society's Main Committee Meeting in Torquay and I have to say everyone was very supportive and encouraging. There were no dinners during July and August which worked well for me personally as I had a hip replacement on the 14th July and couldn't drive for 6 weeks. I was "signed off" by my Consultant on the 28th August and on the 30th August my sister-in-law, Carol and I tackled the first leg of my planned walk of the Southwest Coast Path from Minehead in Somerset to Hartland on the Devon border with Cornwall, a total distance of 116 miles. The walk is to raise money for my chosen charity this year, the Brain Tumour Charity, and there is a link on the Society's website for donations. So far, my sister-in-law and my colleague at Coodes, Kate Bayley, have completed 4 of the 8 sections, Minehead to Porlock, Porlock to Lynmouth, Hartland to Clovelly and Clovelly to Westward Ho! We are taking a break for now over the winter and will tackle the remaining 4 sections in March and April next year. There are two strenuous sections from Lynmouth to Coombe Martin and Coombe Martin to Woolacombe and then a moderate section from Woolacombe to Braunton. The final section is the longest section, some 18 miles, which we'll spread over two days, from Braunton to Westward Ho!

My consultant and the team at

the Nuffield in Plymouth did a fabulous job with my new hip as its not caused me any issues during the walks along some very 'testing' sections of the Southwest Coast Path. A big thank you to them and to Carol and Kate for your company.

In August I had to nominate an Independent Professional Administrator for an estate where one of the Executors went to Court to obtain an order for an Independent Professional Administrator to be appointed.

Also in August I attended a Vision and Purpose Meeting of the Society with Tony, one of the Society's sponsors, "Insight 6", and another member of the Society, Ian, and there will be more to follow from this, such as another member survey in due course.

September brought the second Main Committee Meeting, this time in Taunton, and the Annual Dinner in Somerset, again in Taunton at the beautiful Castle Hotel. Our guests were the Managing Director of the Somerset Chamber of Trade, David Crew and HHJ Kathryn Skellorn KC, who both enjoyed the evening and helped contribute over £500 towards my charity this year, the Brain Turnour Charity, thank you so much.

October was extremely busy with the Legal Service at Exeter Cathedral on the 12th and, this year, we were able to stay dry for the walk from the Guildhall to the Cathedral. Thanks to our secretary, Chris Hart for accompanying me and Chris' wife Liz, and my daughter, Robyn, joining us in the Cathedral.

On the 15th was what I think is my favourite event as President, the Admissions Ceremony in the Guildhall for the newly qualified solicitors in our patch. This year

we had the biggest take up to date and despite the traffic chaos following the lorry fire on the M5 between the Exeter Services and Okehampton exits, leading to myself rocking up at the Guildhall just 2 minutes before the start, and Chris Hart and one or two of the newly qualified solicitors and the official photographer all showing up after proceedings were underway, it was a joyous occasion. One of those admitted that night had actually completed her year 10 work experience with me, many years ago, at the Holsworthy office. I am thrilled that I didn't put her off the law and becoming a Solicitor.

Also in October I attended the Surrey Law Society Annual Awards Dinner in Guildford and the Western Counties Agricultural Valuers Association's 125th anniversary gala dinner at Sandy Park in Exeter where their Chairman, Kevin Bateman, was also raising money for the Brain Tumour Charity as well as Devon Air Ambulance. A big thank you too to my colleagues at the Holsworthy office of Coodes who held a bake sale on Halloween and divided the proceeds between my charity and the firm's charity The Cornwall Air Ambulance. They are going to repeat the bake sale on the 12th of December next, so if you're in North West Devon on that date do look in and support two great causes. Phew!

November has already brought another Awards Dinner, this time at Bristol Law Society where over 16,500 was raised for their Presidents Charity, Young Lives-v-Cancer after an inspirational speech by one of their fundraising team who, herself, had bone cancer aged 8 years old. Coming up in November is also another Main Committee meeting, this time in

Exeter.

It hasn't been "all play" and "no work" however with a number of meetings of the Counties Societies Group, involving DASLS, Kent, Leicestershire, Cheshire and N Wales, Surrey & Newcastle law societies, and attending the Local Law Societies Annual Conference via Teams in September. The Local Law Societies and the Counties Societies Groups are so important in ensuring our voices are heard in Chancery Lane and our current President, Mark Evans is a great advocate and supporter of Local Law Societies and the Counties Societies Group.

As we hurtle towards the Festive season I hope you all have chance to rest and recuperate and enjoy the time with families and friends ready to start 2026 with energy and enthusiasm... and of course, if you fancy a little stroll along the Southwest Coast Path in March and April 2026, ping me an email!! Ho, Ho, Ho!!!



Around DASLS



The Honorary Secretary of the Devon & Somerset Law Society, Chris Hart, has been appointed as a Deputy Lieutenant of Devon.

The Lord Lieutenant of Devon is the King's personal representative and arranges royal visits to the county and escorts members of the Royal Family, attends civic and community events, liaises with local military units, presents medals and awards on behalf of the King within Devon, and recommends nominations for Honours and invitations to Royal Garden Parties. Deputy Lieutenants assist the Lord Lieutenant with all of these duties throughout the county and stand in for the Lord Lieutenant at events to represent the Crown.



We are delighted to announce that Emilie Collis has completed her accreditation to the Children's Panel! Emilie is a valuable member of the firm's childcare department and we are very proud that she has been recognised by the Law Society for her hard work and expertise in children law proceedings.



Qualifying Work Experience: Supporting Your Trainees' Development.



Peter Liver, Chief Director at The College of Legal Practice, explains how Qualifying Work Experience (QWE) can benefit both your firm and your trainees.

From Training Contracts to QWE: How 2021 Changed Legal Training

The introduction of the Solicitors Qualifying Examination (SQE) marked a significant shift in how trainee solicitors qualify. All candidates must now pass two sets of exams—SQE1 and SQE2—and complete two years of Qualifying Work Experience (QWE). This experience must cover a range of competencies outlined by the Solicitors Regulation Authority (SRA).

While QWE may resemble the traditional training contract, it offers far greater flexibility. Trainees can complete QWE before, during, or after their SQE exams, and it can be undertaken across up to four different organisations, with varied durations. As long as the experience is confirmed by a qualified solicitor or compliance officer, it counts toward qualification.

This flexibility has opened doors for trainees to gain experience in diverse roles—from paralegals to volunteers—and across a range of organisations, including high street firms, global practices, charities, and in-house legal teams. It's a positive step toward a more inclusive and representative legal profession.

In 2024, the SRA conducted a survey to assess how QWE is being received. The College of Legal Practice summarised the findings, which highlighted several benefits for firms:

- Development opportunities for existing

employees

- Simpler implementation compared to the Period of Recognised Training (PRT)
- Ability to offer work experience to aspiring solicitors for the first time
- No requirement to assess an individual's competency to practise

However, some challenges were also noted:

- Not all firms could retain paralegals as solicitors after QWE confirmation
- Uncertainty around how to deliver QWE effectively
- Lack of understanding of QWE requirements

Overall, the benefits centre on increased accessibility, while the challenges reflect the need for time and support to embed the new system. Let's explore how QWE can be successfully implemented in your firm.

Employer Responsibilities When Delivering QWE

For many firms, adapting to QWE has been smoother than the transition to SQE exams—especially where robust trainee assessment systems already exist. While some responsibilities from the old PRT system no longer apply, there are specific QWE-related duties to consider.

We advise firms to establish a clear QWE process before a candidate joins or begins their formal experience. Decide who will confirm the trainee's QWE—this can be someone internal, or for smaller firms, an external solicitor or compliance officer. The confirmer must know the candidate's work well enough to be able to confirm it as QWE.

Trainees' work experience must be assessed against

the SRA's core solicitor competencies to see whether it can be considered as QWE. A strong internal review system is essential to track progress and ensure quality throughout the QWE period. This should go beyond a simple tick-box approach. For more detailed guidance, we recommend our resource: [*QWE Considerations for Firms*](#).

Solicitor Apprenticeships

If you are looking at apprenticeship opportunities for your trainees, these carefully designed programmes have proved very popular with firms and give formal QWE opportunities supported by coaching to your trainees. Whilst there are funding challenges relating to the Levy as we move into 2026, the College is running several solicitor apprenticeship programmes in 2026, including a new four-year programme for school leavers.

Who's Doing It Well?

Learning from others can be invaluable. Here are four firms leading the way in QWE delivery:

- **Capsticks:** Offers a structured QWE programme for trainees and paralegals, many of whom begin with prior experience. Trainees work while studying part-time for the SQE, supported with one study day per week on 20-week or 40-week preparation courses.
- **Ashfords:** Supports future external trainees with 20-week SQE prep courses over one or two years before they formally start work at the firm. Their QWE includes traditional four-seat rotations over two years, helping trainees integrate into the

business.

- **Acuity Law:** Early adopters of the SQE, Acuity partnered with us to deliver a flexible programme combining SQE prep with QWE. Some trainees specialise in one practice area, while others rotate through four seats.
- **Amicus Law:** Using the Solicitor Apprenticeship model to offer trainee opportunities that this year are being funded by the Levy. As apprentices, trainees study for the equivalent of one day a week, alongside gaining their QWE over a two-year period.

Want to Know More?

The SQE route, particularly with the flexibility of QWE can be used as a transformative step toward a more diverse legal workforce. With firms pioneering flexible training models, we have been pleased to see opportunities expanding for aspiring solicitors.

To learn more about our partnerships, visit our [Partnership page](#).

I'm also happy to advise on QWE approaches and share insights—please don't hesitate to get in touch by emailing pliver@collegalpractice.com.

Junior Lawyers Division



The Devon and Somerset Junior Lawyers committee have been busy this year arranging fantastic, sell out events.

Some recent events that we held included the Boom Battle, Bar & Solicitor mixer. It was great to network with professionals in different legal careers! There were some keen players on the evening showing off their natural talent in the games. We collaborated with Westcott Accountants in educating our Junior Lawyers in tax. It was great to listen to the top tips to implement in our careers. We continue to work closely with the University of Exeter in supporting the mentoring scheme, thank you again to all those that have volunteered their time to build on the next generation of lawyers.



We recently held our Annual Charity Quiz for our charity of the year, ECCT and Force. We raised a fantastic £600 for our charities to continue supporting the community. The winners of the quiz did a great job, well done again to team Licence to Bill!



The committee would like to extend it's thanks to all the Junior Lawyers, professionals, charity representatives for helping make 2025 a success. We could not have pulled off a fantastic year without all your support. Our final hurrah of the year was the Nutcracker Winter Ball.; on the 14 November 2025 at The Hall. What a great evening that was.



We are holding our AGM on the 9 December 2025, the venue is to be confirmed, keep your eyes peeled on our LinkedIn page for more information.



Why “Normal” Isn’t Good Enough for Confidential Waste Disposal — And Why M&J Bowers Service Is Better Than Normal



In the legal sector, confidentiality is more than a responsibility — it’s a duty of care. Yet many firms still tolerate inconsistent and insecure “standard” confidential shredding services simply because that’s what the industry has normalised.

At **M&J Bowers**, we believe that what’s considered *normal* in our industry doesn’t match the standards expected in yours. That’s why:

Our service is NOT normal.

It’s better than normal.

For over 5 decades, we’ve supported legal practices across Devon, Somerset and the wider South West with a level of reliability, reassurance and professionalism that goes far beyond the industry average.

Where others settle, we raise the bar

Many shredding companies accept missed collections, inconsistent service and poor communication as routine. We don’t. Your work demands reliability — so we build our service around the standards your profession expects.

What makes us better than normal?

- **We put our customers first — always**
We turn up when others can’t, keep our promises, and make confidential waste management friction-free for your practice.
- **We do the *best* thing — not just the right thing**
From secure handling procedures to fully documented destruction, we treat your data as seriously as you do.
- **We make recycling simple, secure and sustainable**
Every shred is responsibly recycled, supporting your Environmental Social Governance goals without adding extra admin.

Accreditations & Credentials That Matter to the Legal Sector

Because trust is earned — and verified.

Our certifications include:

- ☑ **BS EN 15713:2023 accredited shredding**
The gold standard for secure destruction of confidential material.
- ☑ **UKSSA Verified provider of confidential data destruction services**
Ensuring best practice, compliance and complete security.
- ☑ **Secure collection & on-site mobile shredding**
We come to you — or collect and destroy within our secure facility.
- ☑ **Full certification for peace of mind**
You receive documented proof of destruction every single time.

And here’s something unusual:

We even shred on behalf of other shredding companies — so if they trust us, you can too.

Don’t accept “normal” — choose better — Choose M&J Bowers confidential waste recycling specialists.

In a profession built on confidentiality, precision and integrity, your confidential shredding partner should reflect the same values. At M&J Bowers, we deliver secure, sustainable, fully accredited confidential waste destruction — with a service that’s better than normal.

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Better than normal.

Contact us for a quote on 0800 027 6255 or visit www.mjbowers.co.uk

LawCare

Supporting the Legal Community

Life in the Law 2025

Act now and lead the way to a sustainable future

By Trish McLellan and Niamh War-nock

The legal sector has the opportunity to change for the better. *Life in the Law 2025*, LawCare's latest research, shows that if we act now, we can create a sector where people feel supported, can build sustainable and successful careers, and where mental health and wellbeing are valued as an integral part of everyday working life culture.

The *Life in the Law 2025* report, published on 1 October 2025, draws on data collected from individuals and organisations across the legal sector between January and March 2025. It explores how working in law affects people's mental health and wellbeing.

While there's been more activity and growing awareness around mental health since the last study in 2021, the findings show that real improvement remains limited.

What the research tells us

The research showed that there has been progress in some areas:

"More openness to talking about mental health. More access to counselling, well-being coaching and therapy services. More senior people being open about their own mental ill-health."

Some also shared how changes to working practices have made a real difference. One senior solicitor reflected:

"Working from home has been a game changer in terms of managing childcare and managing my disability. I love it and it has prolonged my career by 10 years."

Yet the findings show there's still work to do:

- 56% said they could see themselves leaving their current workplace within the next five years, with 32% saying they could leave the sector entirely.

- Nearly 60% reported poor mental wellbeing.

- Almost 79% said they regularly work beyond their contracted hours.

- Only 31% of people who managed others said that their targets or billable hours were adjusted to take into account the time they need to spend managing others or undertaking appropriate training.

The quotes behind these statistics speak volumes. A licensed conveyancer told us:

"I would like to leave but couldn't afford to and don't know what else to do."

A senior solicitor in England said simply:

"More work, shorter deadlines, fewer lawyers, higher pressure, more greed."

Others pointed to long hours. One junior solicitor said:

"Monday to Friday my days are filled with work from getting up to going to bed after midnight, so there is no time for any other activity."

The need for stronger people management came through strongly in comments. One person said:

"People management is a special skill... it does not follow that because

someone is a good lawyer, they are a good manager."

Why mental health and wellbeing matters

When people in the legal sector are healthy and well, the whole profession benefits. Lawyers who feel supported are more focused, better equipped to handle pressure, and able to make sound ethical decisions. They bring clarity of thought, stronger relationships with colleagues and clients, and the energy needed to do their best work.

But when wellbeing is neglected, the effects ripple out far beyond the individual. High levels of stress and burnout can lead to increased sick leave and people leaving their jobs - or even the profession altogether. Overwork and exhaustion raise the risk of errors, which in turn can compromise judgement and ethical decision-making. Over time, this doesn't just harm careers, it undermines confidence in the whole sector, damaging both reputation and public trust.

What can help

The good news is that there are clear, practical steps that can make a real difference. The report highlights five key areas for action:

1. Tackle overwork – manage workloads, rethink targets, and challenge the culture of long hours.
2. Support managers – train and support people to manage effectively and recognise that management is a vital skill.
3. Offer flexibility – embed hybrid and flexible working in ways that



CROSSWORD

by Frank Murray

support diverse needs.

4. Check what works – regularly review wellbeing initiatives and adapt as necessary.

5. Properly prepare future lawyers – equip students and trainees with the appropriate skills they need for a sustainable career.

Leadership is key

As LawCare CEO Elizabeth Rimmer says:

“We have it in our hands to transform the way we work and build a future where people are supported to perform at their best and build sustainable careers. The path to prioritising mental health and wellbeing before us is clear. Now is the time for leaders to act with courage: move away from practices that normalise overwork, which risk driving people out of the sector, and take the path to a better future by valuing people management.”

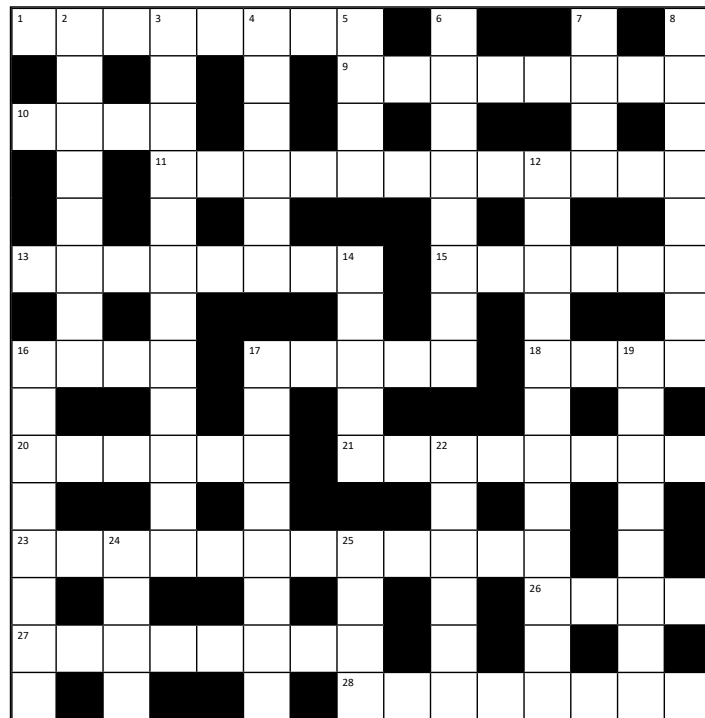
Leadership makes a vital difference. By valuing people, making space for good management, and moving away from practices that normalise overwork, we can build a legal sector that is healthy and sustainable.

A shared responsibility for the future

Life in the Law 2025 is a wake-up call - but also an opportunity to do better. Many people in law are struggling, but we now know the steps that can help.

Read the full *Life in the Law 2025* report here: <https://lawcare.org.uk/life-in-the-law/>

In 2026 LawCare will start a programme of engagement to develop resources and training to support leaders and organisations to put these recommendations into practice. Follow [LawCare on LinkedIn](#) or visit www.lawcare.org.uk to see what is coming up.



ACROSS

1. Verify at point of sale (8)
9. If you're in here, you're away (8)
10. Side made short pastry (4)
11. Boding ill with senseless cargo in scenic twist (12)
13. Bar posh last duck – know what I mean! (8)
15. Give evidence of taking law finals, perhaps (6)
16. I knew if I were in this, internet would be at hand (4)
17. Hotel tucked away in Riviera town (5)
18. Old bird painted by artist about ambassador (4)
20. Rebuke something (6)
21. Daughter overlooked – radically biased? (8)
23. Multiple seller of velocipedes always coming off? (7,5)
26. Villain seen in diagonal setting (4)
27. Greek character involved with hot patient who's nervous (8)
28. Meaningful tale totally drug and bloody (8)

DOWN

2. Setter ends descent into part of underworld? – Capital (8)
3. Proved beyond doubt, at last (12)
4. Unusual peace-keepers lacking energy – surpassed (6)
5. Levy one for transport (4)
6. Doesn't sound quite right to me (8)
7. Half-standard hardy specimen of laurus nobilis (4)
8. Old Kolkata (8)
12. Boarding rail transport without romeo – diverting (12)
14. Award-winning between November and Papa (5)
16. Fagged out climber (8)
17. Fatality not fun, but nice (8)
19. Blown up by developer's kit (8)
22. Man the Spanish Alamo (6)
24. Key opens Pooh rhyme for China (4)
25. Raw ingredient of loveless bedtime rite (4)

DASLS AGM 2026

CALL FOR MEMBERS TO STAND FOR ELECTION!

Please help shape the future of your local Law Society.
The Board of Directors is at the heart of the work and decision making of DASLS and also helps to co-ordinate the important work of the many Committees. As a result, membership of the Board can make a real difference to the Society and to the working life of our legal community across our two counties.

The Board is made up of the Officers of the Society together with (see Articles §7.1.5) “not less than 10 or more than 40 elected members”.

If you would like any further information please contact the Honorary Secretary Chris Hart: chris.hart@wollens.co.uk

Elections will take place at the Society’s Annual General Meeting on Tuesday 21st April 2026. Venue: The Courtyard Marriot to be confirmed.

If you would like to either be nominated or nominate someone for election, please complete the form below. This should be returned to DASLS Honorary Secretary, Chris Hart, by no later than **5.30 p.m. on 31 January 2026.**

TO Chris Hart, DASLS Honorary Secretary
by email: Chris.Hart@wollens.co.uk
or c/o Wollens, At Harbourside, 67 The Terrace, Torquay, Devon, TQ1 1DP

I wish to nominate

Of

for election to the Board and I confirm that the nominee is willing for their name to go forward.

Year of Admission of Nominee

Signed

Address

Please return this form by 31 January 2026.

Property & Private Client Committee

House Buying and Selling Reform

The Government is consulting on a House Buying and Selling Reform with the consultation ending 29 December 2025 (<https://www.gov.uk/government/consultations/home-buying-and-selling-reform/home-buying-and-selling-reform>). Please can all property members complete and voice their thoughts on this Reform via the online survey. This will affect all of us, so we must provide input on what may work, what definitely will not work, and the reasons from the perspective of practitioners who deal with conveyancing “on the ground”. The Property and Private Sub-Committee will be preparing their own draft responses for the National Law Society Board to review in their meeting on 26 November and an initial draft will be offered early November for input with the committee members – if you would like to be involved in this process please email your request Kelly.baker@dasls.com with your email address/contact details.

Updated TA6 and TA7

The updated TA6 and TA7 will become mandatory from 30 March 2026 (<https://www.lawsociety.org.uk/topics/property/ta6-6th-edition>). Please call all members review this to familiarise yourselves with this prior to mandatory adoption. The TA6 has been updated to try to include only relevant information.

Property and Private Client Committee

If you deal with property or private client matters and are interested in updates in the law affecting these areas, or wish to have input on changes to the law or regulatory requirement in these specialisms, please get involved and become a member of our sub-committee. Updates and changes affect all of us who work in these areas, and input from people who deal with the work on a daily basis is greatly valued.

The meetings take place quarterly(ish!) and are a really good place to discuss current and potential future issues and trends, to collaborate on ideas to help with the work we all do, and to support each other. It’s a friendly environment and everyone’s input is valued. We have a good mix of experience and qualifications, and it would be great to get more people involved for different perspectives and ideas shared. We also work towards trying to identify and remedy issues we all encounter to help us in our work, and to help those we represent.

Please email Kelly.baker@dasls.com for further details. Interested parties can sit in as an observer for the first meeting to experience what a meeting involves, and are then welcome to become a committee member.

Law Society Council Member



Richard Adams
Law Society Council Member

If you're reading this (and it would be interesting to know how many will do so) chances are you're a lawyer, and I'd like politely to ask you, what is your role in society, and do you feel any personal responsibility for what happens within it, around you?

Would you accept the premise that bad things happen when good people do nothing?

Do you recognise any moral duty upon you to intervene and advocate for justice – would you accept that passivity can be as effectively harmful as the actions of those who perpetrate 'evil' (however that is defined)?

Can I persuade you to do as I have done, and Get Involved in the Law Society?

There is much that is not as we would want it to be in our legal world. The hurdles placed in our path as we seek to do our jobs increase in height and frequency. Full disclosure - my ability to do much about any of these as your member of the Council of the Law Society is modest. A reason I stood for Council was to try to find out why legal aid practice is in such a poor state. It seems to have got a bit worse each year since I started my articles in 1986. I find that governments of all colours see little point funding our legal and criminal justice systems, and since the Legal Services Act 2007 took away responsibility for most aspects of

the profession from TLS, delegating them to the Solicitors Regulation Authority, government doesn't consult on this or very much else.

You and I of course have no representation on the SRA.

While TLS owns it and pays for it the SRA itself is overseen not by us but by the Legal Services Board: you'll have read that Carson McDowell (a Northern Irish solicitors' firm whose activities are not under the supervision of the SRA) has now reported on its handling of both Axiom Ince and SSB, to the Board, under LSB instructions. We in the Council can do little more than simply sit on the sidelines, read the report and bemoan the chaos.

We are required to report each year to the LSB whether or not we are satisfied that the regulatory role we used to fulfil, now dealt with on our behalf by the SRA, is being adequately fulfilled. We have informed the LSB that it unequivocally is not. Privately the Society's officers have regular meetings with those of the SRA and so the SRA is under no illusions as to the dismal view of its performance held on behalf of the profession by TLS.

However, you'll understand that to a certain extent the starting point for the SRA is bound to disregard most of what we say, on the basis that we, the Regulated, would, wouldn't we? Of course we want to keep the interest on client account balances, etc. So our influence is again limited, and those limits are designed into the system.

The LSB can influence the SRA, but again, that is an organisation on which you have no representation.

The SRA listens to some organisations comprising non-lawyers, but they don't (on the whole) know too much about the profession. It is good that the SRA is also required to consult fairly widely – for instance, it has been assured that solicitors' clients' accounts make the English and Welsh worlds go around and are a good thing by independent accountants (take a bow, Andrew Allen), a position that Anna Bradley seems recently to have accepted. Sadly few organisations such as Andrew's feed in to the criticism of the SRA's performance. Most non-lawyers have little interest in or

knowledge of matters such as this.

As is now all-too-apparent I've never been a salesman, and so I suspect as a means of interesting most of you in the latest scheme of The Law Society to foster the legal society it wishes to create, which it calls 'Get Involved' this gloomy piece about the society will fall flat on its face - but here goes.

<https://www.lawsociety.org.uk/membership/get-involved>

With a bit of luck the line above will appear as a link you can click to take you to the relevant website where opportunities for you to shape the legal future as suits you await. Do please take a look.

Its wings have been tightly clipped. Nevertheless around 400 staff, including many experts, work at Chancery Lane running the Society's complicated business, and the Society has an ambitious plan for the future of the profession. It is openly seeking support from members in our area in order to fulfil this.

I'm sure that like me you'll approve of its plans which include a focus on

- technology,
- the practice of law, and
- consumer experience.

The overall strategy aims to

- promote the growth of legal services with better regulation,
- ensure access to justice (what price jury trials?)
- support the rule of law,
- support responsible business practices and
- enhance the professional experience.

As side issues (but crucial ones) the plan is also to make Chancery Lane a great place to both work and volunteer, developing its capabilities to serve members and aligning people, processes, technology and governance.

Fine words, for a fine profession. We must maximise what little influence remains available to us. Please join me in London and make a small difference.

Actionstep

Intelligent, Timely Data Capture: How Actionstep's Intuitive Forms Solution Streamlines Client Intake

Running a midsize law firm means constantly balancing efficiency with excellence. Meanwhile, clients are expecting a faster, more seamless onboarding experience.

Client intake is often the first impression a client has with a law firm, and modern law firms recognize that manual data entry, document uploads, and back-and-forth emails waste valuable time, delay matter creation, and do not demonstrate the professionalism and efficiency today's legal clients are looking for. More than ever, client intake is setting the tone for the entire client relationship.

That's why Actionstep built Capture: an intuitive forms solution that streamlines data and file collection for law firms and clients, eliminating manual entry and accelerating onboarding.

What Makes Capture Different? It's Purpose-Built for Actionstep

Capture is built directly into Actionstep and designed around how midsize law firms actually work. While other solutions require custom APIs or even manual data transfers, Capture maps the collected information directly into relevant matters, contacts, and documents in Actionstep. This means no double-entry, no copy/pasting, and no gaps in your data.

Capture is a forms solution that understands legal practice management needs,

and automatically handles everything from contact creation to document organization.

Reclaim Time, Reduce Errors, and Create Better Client Experiences

Here are four ways Capture gives you firm an advantage:

1. Automatic Client Intake and Data Entry

The most immediate benefit of Capture is the elimination of manual data entry. With Capture's no-code form builder, firms can create custom intake forms that map directly to Actionstep fields. When a client submits their information, it flows automatically into the right matter, contact record, and data fields without the need for staff intervention.

What your firm can do:

Build and update forms without technical expertise, allowing intake coordinators or practice area leaders to create forms independently

Import client information with one click instead of manually typing or copy-pasting data from emails and PDFs

Integrate with eSignature providers to capture signed documents as part of the intake process, keeping everything in one workflow

2. Streamline Document Collection and Organization

Client intake goes beyond just mapping data. It also involves the collection of critical

documents. Traditionally, these arrive scattered across email attachments, file-sharing links, and physical mail, and in turn require staff to download, rename, and manually upload each file. Capture eliminates this chaos by allowing clients to upload documents directly through intake forms, with automatic routing to the correct Actionstep folders.

What your firm can do:

- Collect files directly through intake forms to receive required documents upfront
- Automatically route uploads to specific matter folders for organized, audit-ready storage
- Create a single source of truth where intake data, documents, and matter information live together in Actionstep Practice Management

3. Creating Professional, Branded Client Experiences

First impressions matter, and when clients receive a generic-looking form from a third-party tool, it can undermine the professional image your firm has built. Capture's custom branding options ensure every client touchpoint reflects your brand and professionalism.

What your firm can do:

- Customize forms with your firm's colors, fonts, and logo for a cohesive presentation
- Provide a seamless client

experience by presenting clear, well-designed forms that guide users through the information you need

- Build trust from the first interaction with modern, client-friendly technology

4. Boost Accessibility and Client Conversion

Client intake shouldn't be limited by office hours or staff availability. Clients expect to engage on their schedule, and firms that offer 24/7 intake options gain an advantage and capture more leads than competitors who do not. Capture allows firms to product embeddable forms to use on their website or to share with clients directly via email, making intake available as soon as a potential client is ready to engage.

What your firm can do:

- Embed forms directly on your website to let clients start intake anytime
- Capture leads around the clock without adding staff or manual follow-up
- Track submissions in a central dashboard for full visibility across all form activity

The Bigger Picture: Client Intake as a Strategic Advantage

Midsize law firms that are successfully cultivating client satisfaction, superior service delivery, and addressing staff time constraints are outpacing their competitors in the market. With Capture, firms can gain a modern intake experience that clients will love, while reclaiming hours of staff time every week.

More than that, Capture maintains data accuracy and integrity throughout the entire matter lifecycle: populating documents, reducing manual entry at every stage, and creating a foundation for efficient operations. The outcome is intake data that automatically feeds into document automation, billing, and reporting so that firms can handle more matters without proportionally increasing staff.

Capture transforms client intake from a manual bottleneck into an automated competitive advantage that enhances every aspect of your practice management.

Ready to see how Capture can transform your firm's intake process? Book a demo today and discover what intelligent, timely data capture can do for your bottom line.

<https://www.actionstep.com/>



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- >> Adverts in DASLS Buzz eNewsletter
- >> Auto mailing to any candidate registered with our website
- >> Included in our social media pages.

www.dasls.com/page/recruitment-latest.html



This September, we officially launched PEXA's UK platform with a nationwide roadshow series, Confidence in Completions: The Road Ahead. From Leeds to London, hundreds of conveyancers, lenders, regulators and industry experts joined us to explore how digital innovation can transform property transactions in England and Wales.

The roadshow was about more than unveiling our technology. It brought the right voices into the room, encouraged collaboration and helped shape a path forward together. The energy was undeniable, and it was a clear sign that the market is ready and excited for change.

Launching the PEXA platform in the UK marks a milestone built on years of collaboration. Our teams across product, technology, legal and operations have worked hand in hand with regulators, lenders and conveyancers to deliver a platform designed specifically for the nuances of the UK property market.

The discussions during the events reflected both excitement and relief about what we are setting out to achieve. Gareth Fullbrook, Partner at Dutton Gregory, said, "Big chains can take until 5pm to complete. We look at anything that makes the completion process easier. Taking workloads off conveyancers isn't about making more profit, it's for our own sanity."

Emma Bough, Director and General Counsel at Muve, reinforced how certainty can change the client experience: "To be able to say 'it will happen on this day at this time' is a game changer. Having all the boxes ticked before completion gives us confidence to talk to clients with positivity about their completion day."

Sarah Ryan, Director at Amity Law, added: "The visibility of the platform, and having all parties on it, will be invaluable. Conveyancers are brilliant at

Wrapping up the Road Ahead: Launching PEXA in the UK

being flexible and adaptable, and the appetite is there to take the leap."

Yanthe Richardson of Foot Anstey captured a common theme around control and visibility: "It is the lack of control that leaves conveyancers discouraged. PEXA can give that back by showing what is outstanding in a transaction."

From an insurer's perspective, Mike Perry of Marsh highlighted how risk reduction can impact PII: "By reference to claims over the last ten years, we estimate at least forty percent of claims by value could be prevented by using the PEXA platform."

On the lender side, Lloyd Cochrane of NatWest emphasised the role of partnerships and how working together can deliver benefits for all: "As a big organisation, we feel responsible for customers and want to be a driver of change. Collaboration is key."

These sentiments were echoed by regulators and industry bodies who stressed that progress comes from collective commitment. Technology alone will not change the market. When combined with shared standards, better data and collaboration, it can help take a step forward in fixing the broken chain.

The roadshow followed our announcement that NatWest has formally appointed us to deliver digital remortgage transactions by mid-2026, with a clear ambition to expand into sale and purchase. As the UK's third largest mortgage lender, NatWest's commitment signals a turning point. With 12.6 percent mortgage market share in 2024 and an expanded book in 2025, adoption of the platform will streamline remortgages and bring faster, more certain completions to consumers.

And this is just the start. Discussions with other lenders are already underway, and the appetite across the market to embrace secure digital

settlement, lodgement and fund transfer is clear.

Reflecting on the launch, Joe Pepper, UK CEO of PEXA, said: "What we have achieved together is something to be proud of. Launching PEXA in the UK has been a true team effort, from colleagues across the business to the industry partners who have engaged with us every step of the way. But this is just the beginning. The real work starts now, onboarding conveyancers, helping them to experience the benefits first hand, and building momentum off the back of NatWest's commitment. We are working with other lenders to bring them onboard too, and we are excited to continue collaborating with the industry to deliver safer, faster and more transparent property transactions."

The roadshows may have come to an end, but for conveyancers, this marks the beginning of a new opportunity. With our platform now live and major lenders beginning to engage, firms can look forward to a future where transactions are faster, safer and more certain, reducing time spent chasing updates and allowing more focus on client relationships and advice.

As Paul Major of the Victorian Land Registry noted when reflecting on Australia's journey: "At rollout's end (In Victoria, Australia), the industry asked, 'Why didn't we do this earlier?' rather than resisting." The UK is on the same path, and momentum is building.

For conveyancers, the opportunity is clear. This is the time to get involved, help shape the next phase of digital conveyancing and be part of building a more confident, connected property market.

If you are a conveyancer and would like to explore what PEXA can do for your firm, visit pexa.co.uk to register your interest and learn more.

www.pexa.co.uk

Family, Crime & Dispute Resolution Committee

Family, Criminal and Dispute Resolution Sub-Committee

Highlights from Recent Events

Since our last update back in the Summer, two events in particular—one focusing on the impact of technology in the courtroom and the other focusing on the ongoing challenges arising from the Mazur case—have drawn significant engagement and discussion.

Exploring AI in the Courtroom

On 24 June 2025, the Sub Committee held an “AI and the way it is changing the courtroom.” event at North Devon Council’s offices in Brynsworthy which sparked a lively debate on how artificial intelligence is transforming legal processes and advocacy.

We were very grateful to our panellists; Natasha Dzameh (St Johns Chambers), Richard Covell (i-Lit Ltd) and Zoë Bushby (Magdalen Chambers) for their engaging presentations and insights.



Cara Hough, Chair
Contentious Probate
Partner and Solicitor
at Irwin Mitchell



Nicola Hall, Vice Chair
Property Litigation
Solicitor at Stephens
Scown

Reflecting on the Mazur Case

On 15 October 2025, Martin Laver (Tozers) chaired a roundtable held via Zoom which addressed the Mazur case and attracted a large audience highlighting the widespread impact of the matter across the region and beyond. Gary Oldroyd (Browne Jacobson) provided his valuable input, and the roundtable provided an opportunity to share with and learn from others how firms in the region are managing the impact of this development.

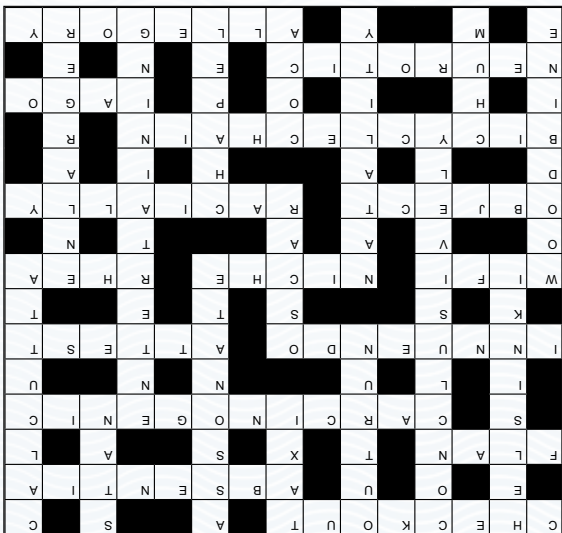
Since the meeting, the Law Society has provided a guidance document dealing with a number of the issues raised with worked examples.

Whether exploring the fast-evolving landscape of courtroom technology or collaborating on complex legal issues, the committee continues to provide a platform for knowledge-sharing, support, and the advancement of legal practice across Devon and Somerset.

If you have a concern that is affecting you or your practice please reach out to any member of the committee to ensure we are able to raise it at our next meeting. Alternatively, please register your attendance and come along to our next meeting, we are always delighted to welcome new faces!

Cara and I will be attending the DASLS Social Committee Christmas Social Drinks on Wednesday 17th December at the White Hart in Exeter from 6:30pm. We hope you will be able to join us!

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A year of remastering: how Landmark raised the bar for environmental due diligence

On 19th November 2024, Landmark Information launched its remastered residential environmental search reports, a milestone that marked the start of a strategy to enhance how environmental risk information is delivered. In the months that followed, we broadened this work to include our commercial portfolio and completed the journey with the remastering of Argyll Environmental's SiteSolutions range. Today, as we celebrate one year since that first launch, it's worth reflecting on what this means for the property and legal sectors.

Why remastering mattered

Environmental risks have always been central to property transactions. From contaminated land and flood risk to coal mining and climate change, these factors can influence property value, insurability, and even the enjoyment of a home. Conveyancers and solicitors rely on environmental searches to protect their clients' interests, but the complexity of these risks has grown. Climate change, infrastructure projects, and evolving regulations demand more than just data; they require clarity, foresight, and actionable insight.

Our goal was simple but significant: to set a new standard for environmental due diligence. That meant rethinking not just the content of our reports, but how they are designed, interpreted, and integrated into modern workflows.

Stage one: residential reports

The first phase focused on our residential portfolio. We introduced intuitive layouts, clearer risk interpretation, and integrated modules for emerging concerns like climate change. By embedding forward-looking climate analysis into products such as **EnviroSearch** and **RiskView**, we enabled conveyancers to advise clients not only on today's risks but on how properties may be affected in decades to come.

This wasn't just an upgrade; it marked a change in approach. Environmental due diligence is now about resilience and preparing for the future, not simply meeting compliance requirements.

Stage two: commercial reports

The second phase focused on our commercial portfolio, where reports were remastered to deliver greater clarity and actionable insight. Among these, **Sitecheck Assess** and **Sitecheck Combined** underwent the most significant upgrades, introducing new risk categories and refining existing assessments. These enhancements include:

- Enhanced flood analysis, broken down by river, coastal, surface water, and groundwater perils.
- Ground stability assessments, covering natural and mining-related hazards.
- Energy & Infrastructure data as standard, removing the need for ancillary reports.
- Climate change modules, offering long-term risk insights for complex transactions.

We also introduced a redefined approach to coal mining risk, the "coal revolution", combining speed, accuracy, and indemnity protection to reduce delays and uncertainty.

Stage three: Argyll Environmental SiteSolutions reports

The final phase of our remastering journey focused on Argyll Environmental's SiteSolutions range. Developed in collaboration with leading law firms, these reports now set the benchmark for clarity and consultancy-led insight.

Each report is written by an expert environmental consultant, turning complex datasets into plain-language commentary and bespoke recommendations.

A key enhancement was the introduction of SiteSolutions Combined + Climate Change, which includes Landmark's market-leading climate change module. This forward-looking analysis helps clients understand potential long-term physical risks such as flooding and heat stress, as well as transitional risks like energy efficiency.

Providing SiteSolutions Combined reports both with and without a climate change assessment gives lawyers and their clients the flexibility to decide whether, and when, this information should form part of the due diligence process. This approach aligns with the updated guidance recently published in the Law Society's Property Climate Practice Note, ensuring compliance and best practice.

The impact

The launch of our remastered reports wasn't just about design changes or minor refinements. It was about giving property professionals the tools to assess environmental risk with greater clarity and confidence. Across residential, commercial, and Argyll consultancy-led reports, these enhancements have reduced false positives, streamlined decision-making, and introduced future-focused modules such as climate change analysis. We've also improved transparency by clearly showing the level of assessment for each risk type, giving conveyancers a straightforward view of how risks are evaluated.

Together, these improvements help conveyancers deliver more informed advice and achieve better outcomes for their clients.

Looking ahead

The property sector will continue to face new challenges, from high level forces like digitisation, and detailed challenges such as climate adaptation. Our commitment is to keep innovating, ensuring that every report we deliver remains the gold standard for clarity, accuracy, and actionable insight. The foundation has been set for Landmark Information to evolve, iterate and continue to lead the market from here.

Want to know more about what's changed?

Join us as we look back on a year of innovation: watch the video on YouTube [here](#).

<https://hubs.ly/Q03V0pZV0>



AI notetaking and transcription: risk management considerations and best practices



UNCOMMONLY INDEPENDENT

Artificial intelligence-driven notetaking or transcription tools (“AI notetakers”) are increasingly used by lawyers, clients, and others to transcribe meeting notes and generate meeting summaries. Notetakers may be embedded in videoconferencing platforms, or utilised as a standalone application.

Below, we discuss risk management concerns arising from their use, followed by recommended best practices and strategies for their implementation.

1. Accuracy and proofreading risks

Although their accuracy is improving, AI notetaking tools remain imperfect. AI-generated transcripts or summaries may contain errors or misinterpretations. Some errors may be due to the lack of human judgment (e.g. missing nuance or context, such as failing to detect sarcasm, tone, or the inflection of a sentence) resulting in significant distortions. AI notetakers may even “hallucinate” to fill in unknowns or gaps (legal or industry-specific terms of art may be particularly susceptible). Notetaking tools may misidentify speakers, especially in multi-party meetings, leading to erroneous attributions.

Adding to the problem, participants may not review or correct AI-generated notes. As a result, errors may become part of “the record.” In some situations, transcripts may be discoverable in litigation, meaning that inaccuracies could be misconstrued by an adversary. Inaccurate transcripts could also become important in a legal malpractice suit; for example, a client may rely on inaccurate notes of a lawyer’s recommendations to argue that proper legal advice was not given.

2. Data privacy and security

AI notetakers pose a threat to the privacy and security of confidential and privileged information. Many

AI transcription services operate in the cloud, meaning that sensitive conversations may be stored on third-party servers. Depending on vendor terms, the data may be retained, analysed, used to train AI models, or even shared with affiliates or other third parties, imperilling confidentiality and implicating privacy concerns.

3. Discoverability

As AI notetaker use increases, so too will related discovery requests in litigation. Those discovery demands not only implicate record preservation issues but also trigger solicitor-client privilege and work product immunity concerns. If otherwise privileged meeting notes are impudently shared or disclosed (e.g. by a client representative sharing them with others in the organisation who don’t have a “need to know”), the privilege could be lost. Given their duty to safeguard clients’ solicitor-client privilege, lawyers should be exceedingly cautious before allowing AI notetakers to be used to record or summarise privileged discussions.

4. Interception of communications

AI notetakers may also breach laws regulating the interception of communications (opens a new window). In the UK, the use of interception is governed by the Investigatory Powers Act 2016. The Act makes it a criminal offence for a person to intentionally, and without lawful authority, intercept in the UK any communication during its transmission. It is not an offence to intercept a private communication if the person who carries out the interception has a right to control the operation or use of the system, or has the express or implied consent of the controller (e.g. in which a company monitors communications over its computer systems in the workplace).

If an AI notetaker is used without clear notice or consent, a lawyer or law firm may inadvertently violate these laws. The safest course is to obtain all participants’ explicit consent to recording before enabling any AI notetaker.

5. Regulatory and client compliance

Certain industries and categories of data are subject to specific regulations on the privacy and protection of information stored,

transmitted or disclosed (e.g. UK GDPR). Additionally, clients may have policies or outside counsel guidelines that restrict the storage, access, or disposal of information. The use of AI notetakers without proper precautions may breach regulatory or client requirements.

Best practices to mitigate risk

If lawyers use AI notetakers, they should do so thoughtfully. Lawyers and law firms should consider the following recommended best practices and tips:

- Policy and governance framework – Develop a firm policy governing when and how AI notetakers may be used. This may include identifying particular tools or applications, as well as categories of communications where use is permitted and those that are off-limits (privileged meetings, strategy sessions, depositions, etc.).
- Vendor due diligence – Thoroughly vet vendors and review vendor terms, including whether transcripts are used for model training.
- Confidentiality, privilege, and work product safeguards – Disable automatic activation of notetaking tools (including those embedded in videoconferencing platforms). Be exceedingly cautious with (and consider prohibiting) the use of AI tools for external meetings, especially those that are especially sensitive or where the attorney-client privilege or work product doctrine may apply. Consider standardising preliminary statements on the record announcing the use of a notetaking tool, participants’ consent, and any confidentiality, privilege or work product protections that may apply. Ensure that transcripts are labelled appropriately (e.g., “confidential and privileged”) and reflect any corrections.
- Notice and consent – Identify and evaluate laws regarding recording, transcription, and privacy in relevant jurisdiction(s). Before recording, announce to all meeting participants that an AI notetaker will be used, and allow any objectors to leave before starting the recording. Confirm that all participants consent to the

Leadership & Management Committee

recording and document their consent on the record. At the outset of meetings, consider asking other participants if they are using AI notetakers or other recording devices.

- Accuracy review and human oversight – Carefully review transcripts for accuracy and be alert for problems such as misattribution, misinterpretations, ambiguities, fabrications, etc. Document any necessary corrections or appropriate context to ensure the transcript accurately captures the meeting.
- Training and awareness – Train lawyers, paralegals, support staff about the limitations and risks of AI notetaking tools, and best practices for maintaining confidentiality, privilege, and work product protections.
- Client communication – Disclose and be transparent with clients about AI notetaker use and the firm's policies and protections in place. Consider engagement letter language disclosing the potential use of AI notetakers, explaining the benefits and risks, and permitting its use absent express client objection. Counsel clients on AI notetaker use, including notice and consent issues, and privilege and work product considerations. If a client uses an AI notetaker for meetings relating to the representation, request a copy of the transcript for review.

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UNCOMMONLY INDEPENDENT



Nicky Mein
Chair, Leadership & Management Committee

Being part of the Leadership and Management sub-committee doesn't sound like life in the fast lane, but it isn't dull!

It provides a chance to reflect on the challenges of leading and managing a law firm, to join discussions with others sharing those challenges, and to be part of identifying opportunities to develop and support current and future leaders and managers in the law firms served by DASLS.

Being part of the Leadership and Management sub-committed can also put you in the front row, as it were, in having a voice in the DASLS feedback on SRA consultations and the like (which can also minimise the guilt for some of us of not always making our own response!)

The Leadership and Management sub-committee agenda very much tries to balance discussion of the day-to-day factors of running a firm; staff retention / salaries (the annual salary survey being a helpful benchmarking exercise for many of us), cyber security, the pros and cons of various case management systems etc. alongside consideration of those issues that just come at us – with Mazur being the most recent example of this, successfully knocking SQE and AI off the top of the list of recent discussion favourites!

As a committee we are trying to widen the membership – through inviting new members and by asking members to have nominated person from their firm who can attend with them or in their place if they can't attend. The idea being both to introduce the future leaders and managers to the workings of the sub-committee and to bring new voices and views to the sub-committee's meetings.

The development of new leaders and managers is something that the sub-committee takes seriously; successful new leaders and managers are after all fundamental to the continued success of our profession. To this end, we are entering the 3rd cycle of a very well received two day course that introduces those looking towards Associate / Partner / Director roles to the different facets of running a legal business. From a personal perspective, this is a particularly useful course for smaller firms like mine who do not have the necessary numbers to provide training of this quality in house – due to both cost and the interactive element that is so important to the exploration of what leadership and management is in 2025.

If you are interested in joining the Leadership and Management sub-committee, or have any particular issues you believe we as a sub-committee should be looking at please contact Tony Steiner tony.steiner@DASLS.com or Kelly Baker Kelly.baer@DASLS.com

If you aren't ready to commit to the sub-committee there are less formal, but equally important options for engagement in discussion on the issues of leadership and management across the region through the Plymouth, Somerset, North Devon, and Torbay and South Devon forums, and in Exeter at the Managing Partner lunch. And for specific topics there is the MLRO Forum (who can live without an extra AML check in?) and the HR Forum. Details of all of these can again be obtained from Tony or Kelly.

Building near or diverting water courses



Gaining permission for building over a sewer at a residential property can be relatively easy to obtain. It involves a process before reaching an agreement between the homeowner and the water company’s Developer Services department. But when it comes to building over water mains it is a different procedure entirely.

Building over a water supply main is prohibited in any circumstance. The reason for this being that water mains are pressurised and carry large volumes of water. As a result, building over the top could result in added compression to the pipe causing a burst, or building works could result in an accidental incision in the pipe. The consequences of this damage can also affect neighbouring properties and could risk contamination.

The presence of a public water main within the boundary of a property is a rare occurrence albeit an inconvenient one. A homeowner planning to extend or build over a public water main has two options.

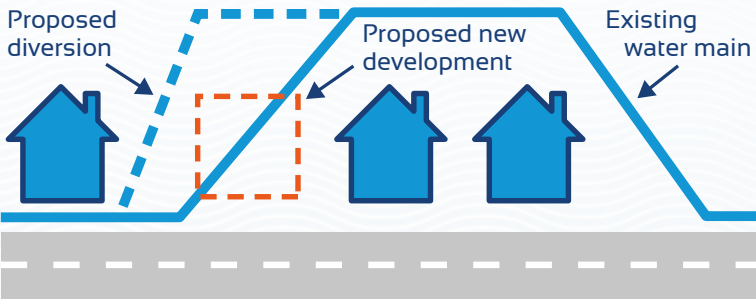
The first option the Water Company may advise is to gain a Build Near Agreement. This is a written agreement consenting that construction can take place either side of the public main. There is a minimum of three metre rule but this is subject to the size, depth and pressure of the water main so the distance may increase if it is a critical main.

The Water Company will generally recommend the homeowner hires a private inspector to visit the property and accurately locate the exact position of the main. Once this has been performed, the inspector should produce a map showing their workings. This can then be shared with the Water Company to begin the process of gaining approval.

The other option for the homeowner is to divert the water main. This can come at a high cost, sometimes greater than the actual cost for the building works that are being implemented. There is a six-step process involved. This is outlined on the right:

- Step 1** The Developer Services department should have an application form on the Water Company’s website. This must be completed and an architect drawing of the property supplied.
- Step 2** The application will be acknowledged.
- Step 3** The Developer Services department will accept the application and request upfront payment.
- Step 4** The Water Company will produce a design proposal and calculate and confirm any additional fees.
- Step 5** An Agreement for signature will be issued along with a line and level form to guarantee the route of the trench.
- Step 6** The Water Company will agree a construction programme. This will take a minimum of six weeks.

More information with regards to diverting a water main can be found in the Water Industry Act 1991.



To summarise, your client would be faced with two options both of which can be costly and labour intensive. This really exemplifies the importance of official drainage and water searches which will reveal whether there are any public pipes within the boundary of the property.

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The Man Who Believed in Yogic Flying and the Search for His Heirs



Finders International trace the family of a former political leader and physicist who left no will

When William Geoffrey Clements passed away in Worthing Hospital in May 2024, his death marked the quiet end of a fascinating life — one that had once brushed the edges of both science and spirituality, and even the political stage.

Known to friends as Geoffrey, the 76-year-old former physicist and leader of the UK's Natural Law Party (NLP) had no children and left behind no will. It fell to Finders International, the professional probate genealogy, to trace his rightful heirs and ensure his £450,000 estate was distributed correctly.

A Life Between Science and Meditation

Geoffrey studied physics at the University of Sussex, completing a PhD in 1974. While rooted in science, his interests shifted toward Transcendental Meditation (TM) and the teachings of Maharishi Mahesh Yogi. He became a TM teacher and lifelong advocate of its philosophy.

This dedication led him into politics as leader of the Natural Law Party, which promoted societal harmony through natural principles — including yogic flying. He ran for Parliament in 1992 and 1997, and led the party's European election list in 1999, gaining brief fame with support from George Harrison.

Despite public attention, Geoffrey remained private, spending time in India and later settling in Barns Green, where he reconnected with the local cricket club.

The Search Begins

When Geoffrey died intestate, his estate initially appeared to have no clear beneficiaries. With no children and four former marriages, Finders International were tasked with finding his next of kin.

As Simonne Llewelyn, CEO of Finders International, explains: "When someone dies without a will, there's a strict legal order of inheritance — starting with spouses, children, parents, and siblings, then moving out to nieces, nephews, and cousins. Our job is to trace and verify everyone entitled under these rules so that the estate is distributed fairly."

The Finders team began by confirming that Geoffrey was an only child and that both parents had long since passed away. From there, the research moved outwards through the extended family tree, uncovering a network of distant relatives spread across the UK.

Among those contacted was a first cousin, also from Sussex, who remembered Geoffrey fondly. "He was a gentleman and a very private person," she said. "We spoke regularly, but he never mentioned being unwell. I think he believed he still had plenty of time — his mother lived to 100!"

Over several months, Finders identified 15 relatives entitled to inherit the estate, ensuring that Geoffrey's assets were distributed lawfully and transparently.

The Value of Professional Research

Cases like Geoffrey's highlight the vital role probate genealogists play when estates are left without clear heirs. Without professional research, unclaimed estates risk becoming bona vacantia — "ownerless goods" that eventually revert to the Crown if no family can be found. "Every unclaimed estate tells a story," says Llewelyn. "We often uncover remarkable lives hidden behind official paperwork. Geoffrey's story stood out for its mix of intellect, idealism and global adventure."

For Geoffrey's relatives, many of whom hadn't seen him for decades, the inheritance came as both a surprise and a poignant reminder of family connections that had quietly endured.

As one cousin reflected, "It's comforting to know that his estate has gone to family. Geoffrey was unique — but he was one of us."

Finders International's work did more than resolve a legal process; it reunited a family, reminding us that behind every unclaimed estate is a human story waiting to be rediscovered.

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