



Private Client
Wills, Trusts and Probate



Any queries and correspondence should be addressed to:

muckle^{LLP}

Keith Hately

Partner

Wills, Trusts and Probate

Direct Line: 0191 211 7928

Mobile: 07557 036 908

keith.hately@muckle-llp.com

Time Central, 32 Gallowgate, Newcastle upon Tyne, NE1 4BF | DX 61011

muckle-llp.com



Muckle LLP advises high-net-worth individuals such as business owners on tax-efficient wills, asset protection and trusts. Keith Hately is a 'first-class lawyer who combines unrivalled technical expertise with a common-sense approach.'

Legal 500





Who we are

We are a team of lawyers specialising in legal services for the private individual, such as wills, family trusts, inheritance tax, probate, powers of attorney and will disputes. Our clients include business owners, company directors and senior executives, professionals, retired business people, privately wealthy individuals and their families, and the owners of farms, estates and rural property.

As part of Muckle LLP, a leading independent commercial and private client law firm, we understand our clients' business and personal needs, which often intertwine. We're focussed on building lasting relationships with clients and other professionals, so that we deliver exceptional advice and service.





How we help

Our support is underpinned by our technical excellence and proficiency as lawyers, but it's how we help that is genuinely different. We are conveniently located in Newcastle city centre but we can meet clients at their business premises or in their homes if that is more convenient.

Professional, practical and personal

We work closely with other professional advisers such as accountants, tax and financial advisers and wealth managers to really understand our clients' circumstances, aims and objectives.

Our team works together in one office, side by side with all our other legal specialists, so our clients can count on swift responses and seamless service.

Clear and simple costs

Everything we do is designed to make life easier and less stressful for our clients, and that goes for our pricing too.

Our pricing is bespoke, upfront and totally transparent and we will offer a fixed fee for our work whenever possible. Value for money is really important, and with our team clients get strong personal relationships, lots of our time and attention and a genuine commitment to understanding and helping them achieve their aims.

As well as being highly skilled, down to earth professionals, all our wills, trusts and probate solicitors are members of the Society of Trust and Estate Practitioners (STEP). We also have a specialist dispute lawyer, who is a member of The Association of Contentious Trust and Probate Specialists (ACTAPS) - essential for handling disputes concerning wills and trusts with skill and sensitivity.



What we do best

We act for a wide variety of individuals and families, and we are happy to work with anyone who wishes to spend some time planning their affairs now, for the benefit of their family in the future.

We have an impressive collective experience of all aspects of private client work.

Our core competencies include:

- preparing all types of wills, from the basic to the more sophisticated including trusts, inheritance tax planning and foreign assets
- setting up family trusts, including discretionary, life interest and bare trusts
- preparing deeds of advancement and appointment from trusts
- advising on inheritance tax planning including gifting, business property relief and agricultural property relief
- lasting powers of attorney, living wills and court of protection matters
- family business succession
- probate including administering high value and complex estates including overseas assets
- preparing post-death deeds of variation of wills
- handling disputes relating to wills and trusts





The firm has a continual dedication to providing their clients with top quality advice and a proven commitment to client focused service of the highest level.

Legal 500 UK

At your service



Keith Hatley

Partner

Over 30 years qualified

Keith is experienced in all aspects of personal estate planning for clients and their families. His work covers wills, family trusts, inheritance tax, business succession, asset protection and probate.

He specialises in advising business owners, whether they are just starting up, growing their business, or planning to sell. Working closely with their other professional advisers, such as accountants and financial advisers, Keith helps clients plan to protect their business and family wealth, and pass it on to their family as efficiently as possible. In his spare time Keith enjoys playing golf and tennis, and has a keen interest in wildlife and horticulture.

Recent work

- advising the owner and directors of a nationally known family business on their wills, shareholdings, business succession and lasting powers of attorney
- advising a local business family with £20m plus assets on wills and trust planning
- reorganising family trusts to cascade wealth down to the grandchildren
- handling the administration of a £12m estate involving business interests and overseas assets



Julie Garbutt
Senior Associate Solicitor
Over 18 years qualified

Julie is experienced in all aspects of personal estate planning for clients and their families. Her work covers wills, family trusts, inheritance tax, business succession, asset protection and Court of Protection work. From rural landowners to corporate CEOs, Julie has helped all kinds of clients protect their family wealth and plan for the future. Julie enjoys cooking and keeping fit, taking part in sport including cycling, running, golf, skiing and wake-boarding, which is like snow-boarding but on water.

Recent work

- advising the owners of a newly formed business regarding their wills and the use of will trusts to facilitate the smooth succession of the business, advising on business property relief and personal and business lasting powers of attorney
- advising parents on their various options for making provision for their adult children and setting up a trust for the grand children
- establishing an employee ownership trust





Olivia Colbeck
Solicitor
Over 20 years qualified

Olivia is experienced in all matters relating to wills, lasting powers of attorney, family trusts and probate. Her main focus is on helping families and executors with probate and the administration of estates. In her spare time Olivia enjoys cycling and hill walking and is also a keen sailor and skier.

Recent work

- working with executors and trustees around the administration of various estates which include winding up existing trusts.
- advising on issues arising from discretionary will trusts.
- handling estates which include business and partnership assets.



Alex Blenkinsop

Solicitor

Over 4 years qualified

Alex is one of very few North East lawyers truly qualified to advise on wills, trusts and inheritance disputes. She is an associate member of ACTAPS (the Association of Contentious Trust and Probate Specialists), a rare accreditation that's essential to ensure that disputes over wills, trusts, estate administration and inheritance issues are handled correctly. Alex is a keen runner and leads Muckle LLP's running group, having completed numerous marathons, half marathons and 10k events.

Alex is also an experienced commercial litigation lawyer, which means she understands both business and personal needs, with the expertise and people skills to guide clients through difficult and emotional situations.

Recent work

- advising the executor of the estate of a UK resident with potential tax liabilities in USA arising out of an interest in Swiss banking facilities and a foundation in Liechtenstein in relation to court proceedings issued by USA Inland Revenue.
- advising a beneficiary who had been excluded from the will of one of his parents on challenging that will on the basis of lack of capacity and also bringing a claim under the Inheritance (Provision for Family and Dependents) Act 1975.
- Advising various clients in relation to issues arising out of discretionary trusts and administration of trust funds.



Expert advice - always

We have specialists in virtually every area of commercial law and whatever your legal needs are, large or small, we're likely to have an expert who can help.

Banking

Top ranked in Legal 500 and Chambers & Partners, our banking team can support any finance issues, from a simple working capital facility to a complicated bond issue or insolvency matter.

Corporate

Our award winning corporate team looks after businesses of all sizes, from family companies to large corporates. Whether you want advice on buying or selling a business, succession planning or gaining investment, we can help.

Commercial

Top ranked in Legal 500, our commercial team knows everything there is to know about intellectual property and commercial contracts big, small, bespoke or standardised, on or off-line.

Technology

From data breach to blockchain and development to procurement, IT is a rapid growth area in business with many legal implications. It's why our specialist technology team is a huge asset to the region.

Dispute Resolution

Our dispute resolution team is regularly engaged in multimillion pound national and international litigation as well as smaller local disputes. It's advice includes alternative dispute resolution, emergency remedies and debt recovery.

Employment

Our employment team is renowned for its communication skills and for handling highly sensitive senior team changes. Our lawyers also regularly give talks and training on employment law, ideal for in-house legal teams and HR professionals.

Real Estate

Our large real estate team has the specialists to handle every commercial property issue from acquiring new premises to asset management and property development, as well as property disputes and construction.

Agriculture, Estates and Rural Property

Our rural specialists relish being out and about, getting their boots muddy and talking through your legal issues in person. From buying and selling property to renewable energy or mines and minerals issues, they can help.

This is just a snapshot of the expertise Muckle offers, with many more specialist practice areas available. Speak to anyone in our team to find out more.



Where issues require other forms of legal expertise the firm's comprehensive coverage of all aspects of law is incredibly useful."

Legal 500 UK

Being a responsible business

We care passionately about having a positive impact on our local community and environment. We encourage all of our people to take on roles and responsibilities in the community and over 40% of us regularly volunteer for charitable causes outside work.

We donate a percentage of our profits to the Muckle Charitable Fund each year, which we distribute to worthy causes across the North East. Our Let's Think Green Team also helps us keep our carbon emissions as low as possible, and each year we donate the cost of our carbon footprint to local charities dedicated to improving the region's environment.



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