



 **SHAKESPEARE
MARTINEAU**
Legal advice for life and business

Legacy Conference

Shakespeare Martineau, The Shard, London

13 November 2025

13:00 - 18:00



Legacy Conference

Attendance to this event is free of charge, but places are limited and must be reserved in advance. To secure your place, please [click here](#)

Agenda

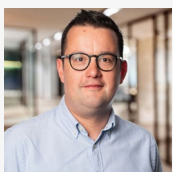
- 13:00 Registration
- 13:50 Making sense of the IHT Reforms
- 14:20 Misdescribed gifts in Wills - Avoiding legal pitfalls
- 14:50 Coffee break
- 15:15 Who really owns the art? Untangling ownership, title and possession
- 16:00 The fine print of heritage: Risks in Land and Property Donations
- 16:30 Panel discussion
- 17:00 Networking drinks
- 18:00 Close

I Conference topics

Philanthropy in 2025

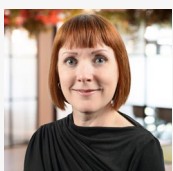
In this session, Andrew and Catherine will provide a detailed overview of the anticipated reforms, breaking down what they could mean for charities, donors, and fundraising teams alike.

They'll also cover key areas of interest, such as how to establish charitable foundations, the practical and financial advantages of Gift Aid, and the critical differences between lifetime giving and donations made upon death.



Andrew Wilkinson

Head of Trusts &
Estate Disputes
Shakespeare Martineau



Catherine Rustomji

Partner & Head of Charities
Shakespeare Martineau

Misdescribed gifts in Wills - Avoiding legal pitfalls

Charitable gifts in Wills are often made with the best intentions, yet misdescriptions - whether of the Charity itself or the nature of the gift - can lead to unintended consequences, legal complications and issues with distributing estates.

This session will explore the legal consequences of misdescribed charitable gifts, focusing on recent cases showing the approach adopted by the courts when interpreting such legacies.

Attendees will gain insights into the principles of construction, cy-près doctrine, and the role of extrinsic evidence in resolving ambiguity. This session is aimed at helping you navigate the legal issues and protect the integrity of charitable intentions in Wills.



John Tunnard

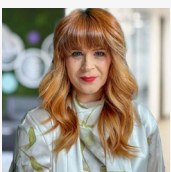
Partner & Head of Bristol
Shakespeare Martineau

I Conference topics

The fine print of heritage: Risks in Land and Property Donations

This session will explore how to identify and manage the risks of land or property donations, particularly those with heritage designations. We'll cover key red flags such as planning restrictions, conservation obligations, and environmental liabilities, and explain how early due diligence can prevent costly surprises.

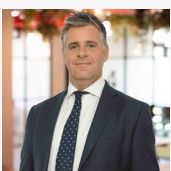
The session will also discuss engaging with local authorities and heritage bodies, the right questions to ask, and steps to protect your organisation - whether you plan to sell or retain the property - helping you make informed decisions and maximise the value of these complex gifts.



Hannah Hamilton-Rutter

Heritage Director

Marrons



Richard Cooke

Associate Director

Marrons

Who really owns the art? Untangling ownership, title and possession

The session will explore some of the key issues that make art a challenging asset for trusts and estates. It will examine questions of ownership, title, and possession, considering what it truly means to hold 'title' to art. This raises issues such as the nemo dat principle, the lex situs rule across jurisdictions, extinction of title by limitation, and lost title in old unadministered estates. As we will see, provenance is king!



Luke Harris

Barrister

No.5 Stone Buildings

I Presenters



Andrew Wilkinson

Head of Trusts &
Estate Disputes
Shakespeare Martineau

Andrew leads our trusts and estates dispute team, handling will disputes, financial claims, executor and professional negligence issues, and contested Court of Protection cases for local and international clients in complex, high-value, often cross-border estates.



Richard Cooke

Associate Director
Marrons

Richard, a Chartered Town Planner and RTPI member with 20+ years' experience, advises on residential and commercial projects, assessing development potential, creating planning strategies, and unlocking value for a diverse client base.



Catherine Rustomji

Partner & Head of Charities
Shakespeare Martineau

Catherine Rustomji, Partner and Head of Charities at Shakespeare Martineau, has 20+ years' experience advising charities, social enterprises, and individuals on governance, constitutional matters, legal structures, and trustee duties.



Hannah Hamilton-Rutter

Heritage Director
Marrons

Hannah, head of the heritage team and full IHBC member, has 13+ years' experience advising nationally on heritage issues, helping clients balance development proposals with conservation across land, energy, and regeneration projects.



John Tunnard

Partner & Head of Bristol
Shakespeare Martineau

John leverages his experience as a non-contentious private client solicitor in matters such as Wills, Trusts, and tax-efficient settlements. While firm in his approach, he advocates using Alternative Dispute Resolution to resolve disputes sensibly and proportionately.



Luke Harris

Barrister
No.5 Stone Buildings

Luke has a Chancery practice spanning trusts and probate disputes, commercial claims, and art and cultural property matters, advising individuals, states, and auction houses on ownership, title, conversion, insurance, and related issues.



I Book now

Who should attend

This conference is for professionals who deal with charitable gifts left in wills.

Venue

Shakespeare Martineau
The Shard - Level 19
32 London Bridge Street
London
SE1 9SG

Date and time

13 November 2025
13:00-18:00

How to book

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For more information about our legacy conference, please contact:

Daljit Flora

Shakespeare Martineau
E: daljit.flora@shma.co.uk