



Private Client

Wills, Trusts and Probate

who we are

We are a team of lawyers specialising in legal services for the private individual, such as wills, family trusts, estate and succession planning, probate, powers of attorney, trusts 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.



Julie Garbutt
Partner
Private Client

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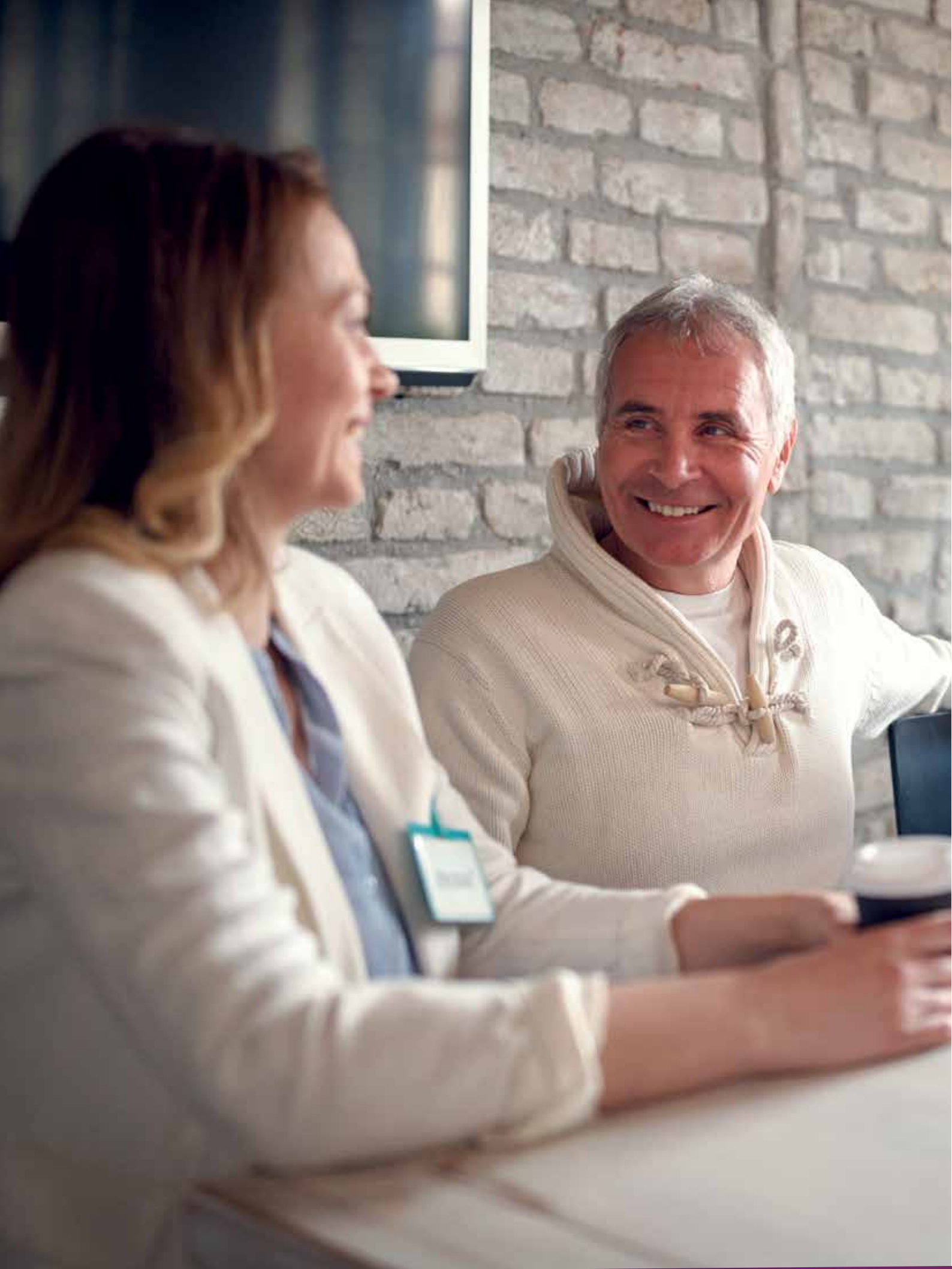
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Muckle LLP advises high-net-worth individuals such as business owners on tax-efficient wills, asset protection and trusts. Keith Hatley is a 'first-class lawyer who combines unrivalled technical expertise with a common-sense approach.'

Legal 500



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 and farming 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



at your service

Julie Garbutt
Partner | Private Client

A Legal 500 UK 'Recommended Lawyer', Julie is a partner in our private client team and a specialist in all aspects of personal estate planning.

Her expertise is multifaceted; Julie advises on wills, family trusts, family business succession, asset protection and powers of attorney – working with individuals, businesses, landowners, client accountants and financial advisers to provide practical, comprehensive and seamless legal support.



Julie Garbutt is an excellent solicitor, she is one of the most capable individuals I have worked with in the North East. She has gone the extra mile in client service and advised on technical legal issues to assist with complex tax problems.'

Legal 500 UK, client quote



Rachael Stephenson
Associate Solicitor | Private Client

Described by the Legal 500 as a “breath of fresh air”, Rachael is recognised by Chambers & Partners for providing “no-nonsense advice” and being “brilliant at helping clients to understand principles and why things need to be done, without making it overcomplicated”. She takes pride in building trusted relationships with her clients and takes time to get to know them, appreciate their concerns and identify their priorities.

Rachael's specialisms include dealing with the higher-level succession planning needs associated with more complex family arrangements such as in cases of vulnerable beneficiaries, second marriages, High Net Worth and Ultra High Net Worth clients and those with cross-jurisdictional estates. Her particular areas of expertise include advising on charitable and private trusts and personal planning for business owners. Over time, Rachael has become a practised public speaker and regularly lectures on her specialist subjects.

As a Trustee of several charities, including Eden Valley Hospice & Jigsaw Rachael promotes philanthropy in all its forms. She is experienced in helping clients to realise their goals; giving as much as they can, in a tax-efficient way whilst making the greatest impact to those in need.

Rachael is based at Muckle's Cumbria hub.



Tim Boardman
Associate Solicitor | Private Client

Tim is a Partner in the Private Client team, advising on and realising clients' desired estate and succession plans. He advises individuals and trustees on the management of landed estates and agricultural holdings and believes that clients' needs in this field are united by two things: human understanding and technical ability.

With a specialism in succession planning for families with private business interests, Tim has worked with landed estates and families with significant agricultural business assets, including those where the beneficial ownership of family land is a patchwork of individual and Trust interests. This work involves expertise in wills, trust drafting and administration, estate administration and post death variations of wills, Powers of Attorney (including lasting powers) and Court of Protection Deputyship Applications.



Olivia Colbeck
Associate Solicitor | Private Client

Olivia provides a private client service for the firm's individual and business clients, using her experience in wills, lasting powers of attorney, probate, family trusts and inheritance tax to enable individuals and their families to plan for their future. Olivia is a member of the Society of Trust and Estate Practitioners (STEP).

Olivia's main focus is helping families and personal representatives with probate and the administration of estates, both where the deceased has left a will and on intestacy. Olivia handles estates which include business, partnership and agricultural assets. Olivia will also provide advice on post-death variations of the estate and works with executors and trustees to wind up existing trusts and administer discretionary will trusts.



Excellent depth of technical expertise combined with good practical application. Very well connected with other parts of their practice (i.e corporate).” “Strong technical knowledge and good client handling skills.” “The team works well with all legal disciplines in their wider business and they have a very strong trust advisory capability.’

Legal 500 UK



Winter Addis

Associate Solicitor | Private Client

A trusted and down to earth associate solicitor in our private client team, Winter has a wealth of experience working with families to provide high quality advice on all private client matters including wills, succession planning, inheritance tax planning, powers of attorney and advice in connection with trusts, estates and property matters.

Before joining Muckle in 2022, Winter completed her legal training at a local Cumbrian firm and held positions at other prominent firms in the area. She specialises in Private Client work and has a keen interest in estate and succession planning matters.

Winter understands the demands and needs of the particular rural and business clients she works with, being rooted in the local Cumbrian business network herself.

Winter is based at Muckle's Cumbria hub.



Alex Speirs

Senior Associate | Dispute resolution

Alex has been recognised in the Legal 500 UK for several years now as a 'Rising Star UK' in the field of commercial litigation in Newcastle.

An experienced litigator, Alex deals with a broad range of commercial disputes for corporate clients and individuals in relation to a variety of contentious issues including shareholder disputes, professional negligence, data protection, intellectual property and reputational issues and general commercial contracts. Alex has recently been involved with high court claims in relation to high-value breach of warranty claims, negligent investment advice and data protection.

Alex always works to support her clients in trying to avoid disputes if possible or to resolve disputes in a practical and cost-effective way.



Private client legal work is a specialist area which can be underserved by a number of local firms. Muckle do however provide a great service ensuring that their clients receive great advice and that the team become trusted advisors to their clients.'

Legal 500 UK



Nicola Bache
Paralegal | Private Client

Nicola is a paralegal in the Private Client team, supporting Private Client fee earners by drafting lasting powers of attorney, wills and trust documents.

Sitting across two roles, Nicola is also a PA in the Private Client team, dealing with day to day administration, and she has previous experience as a PA in the Corporate team.



A very experienced team with a diverse range of specialist in other areas of law to draw upon if the need arises.” “In depth agricultural and rural legal knowledge”. “Client service and speed of response.” “Approachable and good to access with a very clear sound agricultural knowledge.’

Legal 500 UK, client quote

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.

Corporate

Independent researchers at Legal 500 and Chambers & Partners rank our corporate team top in the North East and we have won Corporate Law Firm of the Year at the Insider North East Dealmakers Awards more times than any other firm.

Banking and Restructuring

Top ranked in Legal 500 and Chambers & Partners, our award-winning team can support any debt finance raising, from a simple working capital facility to a complicated bond issue or multi-bank arrangement. They also provide advice on debt restructuring and any insolvency and creditor issues.

Real Estate

Large and highly respected, our award-winning real estate team has the specialists to handle every property issue from acquiring new premises to asset management and property development, as well as property disputes.

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 offline.

Technology

From data breaches to development and procurement, IT is a rapid growth area in business with many legal implications. That is 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 offers strategic advice and alternative dispute resolution, emergency remedies and a highly successful debt recovery service.

Employment

Our employment team has a broad range of expertise. It is renowned for its communication skills and for handling highly sensitive senior team changes. In addition to day-to-day legal work, our lawyers regularly give talks and training on employment law, ideal for in-house legal teams and HR professionals.

Private Client

For business owners, directors and senior executives we offer a personal private client service to advise on all aspects of estate planning, including wills, succession, inheritance tax, family trusts, powers of attorney and probate.

Procurement and Subsidy Control

We support contracting authorities and bidders on all procurement needs and subsidy control issues. From subsidy control advice needed to unlock grant funding, to procurement challenges and processes, contentious or strategic, we assess every potential risk before it becomes an issue, to give practical legal support that makes regulated procurement and funding happen.

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.

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.

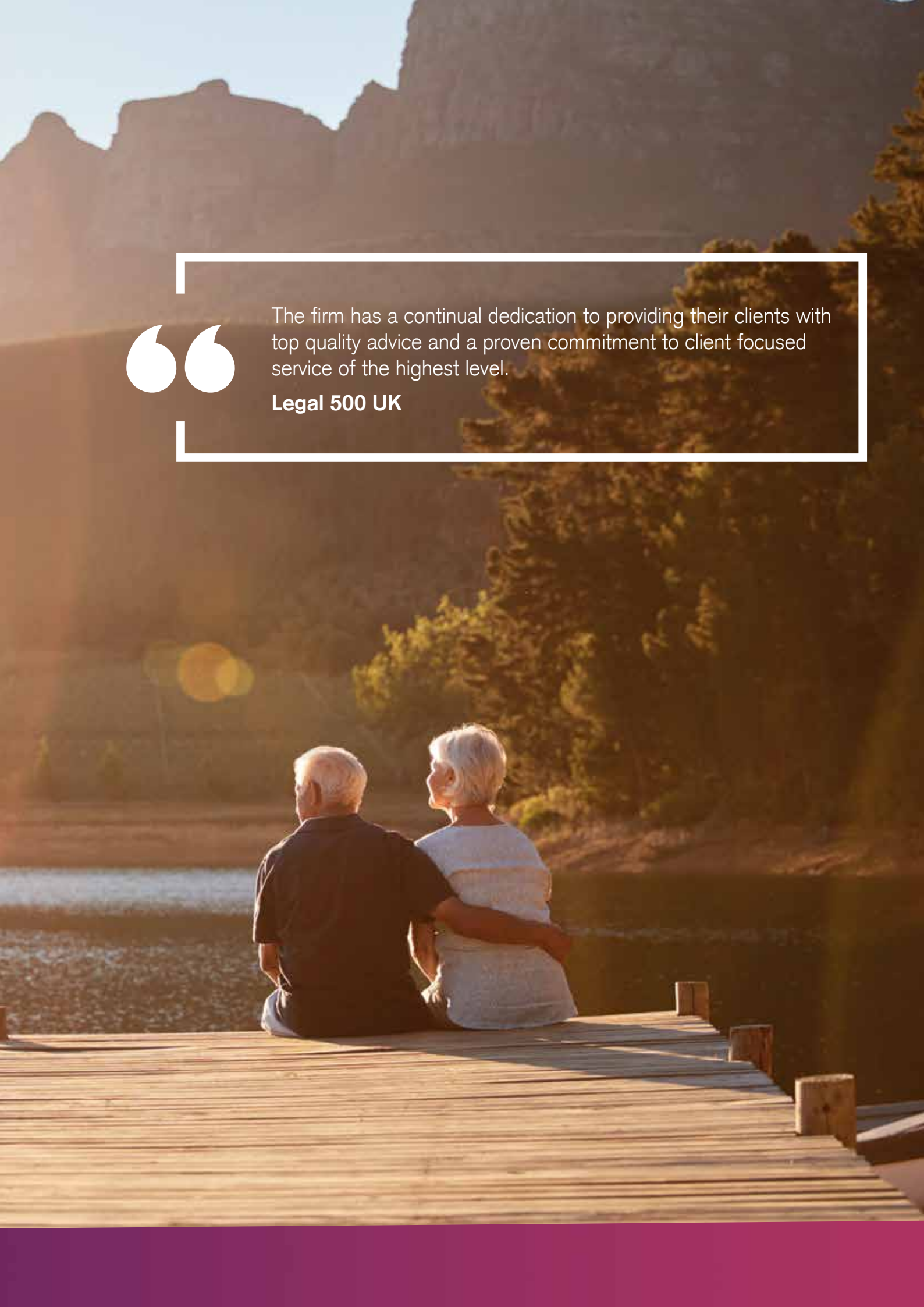
We donate a percentage of our profits to the Muckle Charitable Fund each year, which we distribute to worthy causes across the North East. Our Let's Think Green Team also helps us keep our carbon emissions as low as possible, and each year we donate the cost of our carbon footprint to local charities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





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.

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