

#### Alan Brown

**Partner**  
**Lifetime Planning**

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Alan is a private client specialist who has been with the firm for over 30 years and is a former managing partner of Ashton Graham. Alan specialises in capital tax planning, including acting for clients with foreign assets and non-UK domiciles, Wills, probate, trusts, long-term care planning and matters affecting the elderly client.

#### Richard Guy

**Partner**  
**Lifetime Planning**

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He is an experienced solicitor and provides bespoke and expert legal advice for clients planning for the future. He specialises in private client law and has experience acting for a range of clients, from business owners, farmers and high net worth individuals to retirees and the elderly. He advises on a wide variety of matters, including Wills, trusts, inheritance tax and estate planning, powers of attorney, probate & estate administration, including estates with business interests and land or overseas assets.

#### Elizabeth Dunn

**Senior Associate**  
**Lifetime Planning**

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Elizabeth qualified as a solicitor in 1988 and is a member of the Society of Trust and Estate Practitioners (STEP). She specialises in estate administration, but has experience in all aspects of private client work. Her work includes administering high value and complex estates on death, in particular agricultural estates, Deeds of Variation, Declarations of Trust and Inheritance Tax and Capital Gains Tax planning.

#### Faye Stolls

**Senior Associate**  
**Lifetime Planning**

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Faye qualified as a Solicitor in September 2010 and is a member of the Society of Trusts and Estate Practitioners (STEP) having passed the post-graduate STEP Diploma in Trusts and Estates in 2015. She now specialises in Wills, Trusts, Tax and Estate Planning and Lasting Powers of Attorney. Faye regularly assists clients with complex circumstances and is able to use her technical expertise to offer clients practical solutions to achieve their aims.

#### Jennifer Valentine

**Senior Associate**  
**Lifetime Planning**

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Jennifer has experience in all aspects of Private Client work. Jennifer qualified as a Chartered Legal Executive in 2018 before cross-qualifying as a Solicitor in 2019. Jennifer has over six years experience in Private Client Law and is a fully qualified member of the Society of Trust and Estate Practitioners (STEP) and a Dementia Friend. Jennifer deals with Wills, Inheritance Tax Advice, Lasting Powers of Attorney, Enduring Powers of Attorney, Probate, Trusts and Court of Protection.

#### Natalie Westgate

**Senior Associate**  
**Lifetime Planning**

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Natalie qualified as a Solicitor in 2008 and specialises in Wills, Powers of Attorney and Estate Planning, as well as Probate and Estate Administration including foreign assets, and the administration of Trusts. Natalie is also a member of the Society of Trust and Estate Practitioners (STEP). Natalie also provides Trust advice including Charitable Trust advice. Natalie has experience dealing with a wide range of private client matters.

#### Rebecca McCarthy

**Associate**  
**Lifetime Planning**

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Becky qualified as a solicitor in January 2018 and specialises in Wills, Inheritance Tax Advice, Probate and Estate Administration, Lasting Powers of Attorney and Enduring Powers of Attorney, Care home fee planning, Trusts and Court of Protection work. She is a qualified member of the Society of Trust and Estate Practitioners (STEP) and has particular expertise in relation to Universal Wealth Preservation.

#### Emily Barnard

**Associate of the Chartered Institute**  
**of Legal Executives**  
**Lifetime Planning**

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Emily specialises in a wide range of private client work, including the preparation and registration of Lasting Powers of Attorney, registrations of Enduring Powers of Attorney, and Will drafting.

#### Sally-Ann Walsh

**Senior Paralegal**  
**Lifetime Planning**

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Sally primarily assists clients with probate matters. She joined the firm in 2006 having previously assisted a senior partner for a law firm in Cardiff specialising in Estate Administration. Sally has over 20 years' experience in the Private Client field.

#### Georgia Wilks

**Paralegal**  
**Lifetime Planning**

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Georgia deals with the drafting of Wills, Probate and Estate Administration, and Powers of Attorney. Georgia studied Law LLB at the University of East Anglia in 2021, graduating with a 2:1. She plans to study the LPC LLM in the near future with the aim to become a qualified solicitor.

#### Leanne Russell

**Paralegal**  
**Lifetime Planning**

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Leanne offers her clients legal support and guidance on any queries they may have. Leanne studied Law LLB at Anglia Ruskin University, graduating in 2021. She went on to study the LPC LLM with the University of Law, graduating in 2023. Leanne aims to qualify as a solicitor.

#### Lynn Wicks

**Partner**

**Lifetime Planning**

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Lynn qualified as a solicitor in 2000 and is a qualified member of the Society of Trust and Estate Practitioners (STEP). Lynn has extensive experience in private client matters. She deals with all aspects of private client work, including the administration of unusual, complex and diverse Estates, Estate Planning, Wills and tailored Powers of Attorney. Lynn specialises in work for elderly and vulnerable clients and those with mental capacity issues.

#### Sally Power

**Partner**

**Lifetime Planning**

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Sally is a Partner in our Lifetime Planning team. She advises on a broad range of private client work, including Wills, estate planning, Lasting Powers of Attorney, Trusts, and estate administration. She works with a variety of clients, including high-net-worth individuals, retirees, the elderly, business owners, and farmers. Sally is a qualified Trust & Estate Practitioner (TEP) and has the STEP Advanced Certificate in Will Preparation. Sally is a member of STEP.

#### Jennie Pratt

**Consultant**

**Lifetime Planning**

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Jennie qualified as a solicitor in 1984 and is a full member of Society of Trust and Estate Practitioners (STEP). She is also a member of the Association of Taxation Technicians. Jennie specialises in wills, probate, trusts, tax and estate planning, powers of attorney and court of protection work. She has helped thousands of clients and their families in that time and has very wide experience at all levels in probate work.

#### Christina Duck

**Senior Associate**

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Christina qualified as a solicitor in 2001 and is a fully qualified Trust and Estate Practitioner (TEP). Christina has a particular interest in Cross Border work and specialises in probate administration, Wills, powers of attorney, trusts and estate planning. Christina handles complex matters and supervises other members of the team.

#### Zara Bracegirdle

**Senior Associate**

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Zara qualified as a Solicitor in 2008 and is a member of the Society of Trust and Estate Practitioners (STEP). She specialises in Wills, Powers of Attorney and Estate Planning, as well as Probate and Estate Administration, including the creation and administration of Trusts as well as dealing with foreign assets and families with business interests.

#### Amanda Smitherman

**Associate**

**Lifetime Planning**

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Amanda builds up relationships with her clients and has acted for generations throughout families. Amanda has many years of experience in all aspects of private client work and has dealt with hundreds of her own probate matters, as well as assisting the senior members of the team with complex probate matters.

#### Jonathan Dattani

**Solicitor**

**Lifetime Planning**

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Jonathan qualified as a Solicitor and is an Affiliate Member of the Society of Trusts & Estate Practitioners (STEP) and is studying towards full membership. Jonathan advises clients on a broad range of Private Client matters, including Wills, Inheritance Tax advice, Trust Administration, Lasting Powers of Attorney and Probate matters.

#### Karen Loftus

**Senior Paralegal**

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Karen specialises in Probate, Wills, Registration of Enduring Powers of Attorney and Lasting Powers of Attorney matters. She has many years of experience in the Private Client field and her work includes drafting Wills, Lasting Powers of Attorney, Registration of Enduring Powers of Attorney and Probate matters (both taxable and non-taxable).

#### Patricia Gray

**Senior Paralegal**

**Lifetime Planning**

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Patricia qualified as a Senior Paralegal in 2013 and deals with a broad range of private client work. Her work includes Wills, Lasting Powers of Attorney, Care Funding, and advising on Deputyship applications and Probate matters (both taxable and non-taxable) – approximately 65% of Patricia's time is spent on probate matters.

#### Claire Terrington

**Paralegal**

**Lifetime Planning**

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Claire specialises in Wills, Probate and Estate Administration, Lasting Powers of Attorney, and Trust administration. Claire joined Ashtons in 2019 as a Legal Assistant, progressing to Paralegal in 2022.

#### Melissa Callaghan

**Paralegal**

**Lifetime Planning**

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Melissa is experienced in the drafting of Wills, Estate Administration and Lasting Powers of Attorney. She explains the process of creating a Will or Power of Attorney clearly to guide her clients smoothly through the process and offers help where needed.

#### Janette Wand

**Partner**

**Lifetime Planning**

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Janette qualified as a solicitor in 2007. She is also a qualified member of STEP (Society of Trust and Estate Practitioners) and an Accredited Lifetime Lawyer for the Association of Lifetime Lawyers. Janette has helped hundreds of families in dealing with estates of deceased relatives. Janette deals exclusively with private client issues, approximately 60% of which is in handling probate work. Janette deals with a full range of probate work, the majority of which include complex legal and tax-based issues. She has a particular specialism in advising elderly and vulnerable clients and their families on issues surrounding succession, tax and mental capacity. She also deals with deputyship applications at the Court of Protection.

#### Louise Cardwell

**Partner**

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Louise deals exclusively with private client issues and leads Ashtons Legal in developing working practices for estate planning and succession. Louise qualified in 2008 and joined the firm in March 2014. She is a qualified member of STEP (Society of Trust and Estate Practitioners), ATT (Association of Taxation Technicians), and the Association of Lifetime Lawyers. Louise specialises in estate administration, Will drafting, powers of attorney, tax advice, and the preparation and management of trusts. Her particular niche is advising business owners, farmers, high net-worth individuals, and people with complex succession issues including the effective use of trusts. Approximately 60% of Louise's work is handling probate work.

#### Stephanie Lems

**Solicitor**

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Stephanie is experienced in Wills, Lasting Power of Attorney and Probate matters. She qualified as a solicitor in September 2023. After graduating from Bangor University in 2016, Stephanie spent several years as a paralegal in various firms in the Manchester area before gaining a training contract that resulted in a move to the Southeast in 2021 before arriving at Ashtons Legal in June 2024.

#### Harriet Richardson

**Associate**

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Harriet splits her time between working on Probate (30%), Wills (30%), Lasting Powers of Attorney (30%) and Enduring Power of Attorney registration (10%). Harriet began her career in private client law in 2013. She then joined Ashtons in 2017 dealing with Probate, Wills and Powers of Attorney. Harriet offers a bespoke service tailored to the client's needs as well as knowledge and understanding of the current law and document drafting.

#### Nicola Brumby

**Paralegal**

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Nicola assists the Lifetime Planning team with drafting Wills, estate administration and probate, as well as creating Powers of Attorney. Nicola is organised and empathetic and enjoys assisting people going through difficult times in their lives, such as bereavement.

#### Daniel Thorn

**Paralegal**

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Daniel assists the team with drafting Wills, estate administration and probate, as well as creating Powers of Attorney. Daniel completed his LLB Law degree in 2011 at the University of Winchester followed by his LPC in 2014 at the University of Law, Guildford. Daniel joined the Lifetime Planning team as a Paralegal in May 2024.

#### Karen Bacon

Senior Associate  
Lifetime Planning

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Karen is a highly experienced member of our Lifetime Planning team, having qualified as a Fellow of CILEx in 1992. She is also a member of the Society of Trust and Estate Practitioners (STEP) and has been since 1996. She advises on Wills, Inheritance Tax, Estate Planning and Probate, Lasting Powers of Attorney and the creation and administration of trusts. Karen has a particular specialism in the agricultural sector.

#### Gemma Helsdon

Senior Associate  
Lifetime Planning

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Gemma qualified as a solicitor in 2015. She is a full member of the Society of Trusts and Estates Practitioners (STEP) and has a STEP Advanced Certificate in Will Drafting. Gemma is experienced in Wills, Estate Administration and Probate, Inheritance Tax Planning, Powers of Attorney, Trusts, and lifetime and succession planning for high net-worth clients. She has experience in assisting individuals and their agents (including high net-worth clients) in all aspects of lifetime and succession planning.

#### Loren Clapham

Trainee Legal Executive  
Lifetime Planning

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Loren joined the Lifetime Planning team in 2017 and has risen quickly to the role of Trainee Legal Executive. She is currently studying for the CILEx qualification to become a Chartered Legal Executive. She spends an equal amount of time dealing with Wills and Lasting Powers of Attorney as she does on Probate.

#### Heather Williams

Paralegal  
Lifetime Planning

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Heather assists the lawyers within her immediate team and the wider Lifetime Planning department. Heather divides her time equally on matters regarding Probate, Wills and Lasting Powers of Attorney.

#### Dinah Braddick

Paralegal  
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Dinah assists the team with the preparation of Wills (30%), Grants of Probate (30%), Lasting Powers of Attorney (30%) and other related matters (10%).