



Neil Bleakley

Partner



Areas of Law: Probate, Wills and Trusts, Wealth Management/Protection and Mental Capacity

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Background

Neil graduated from the Queen University in Belfast in 1995 with a degree in law (LLB Hons.), before attaining a masters degree (LLM) in Computers and Law the following year, also from the Queens University of Belfast.

Neil joined the firm as an apprentice in 1996 and qualified as a solicitor in 1998. From qualification, Neil has worked in the private client team, becoming head of the team in 2002.

Neil is a member of the Society of Trust and Estate Practitioners and recognised by both the Legal 500 and Chambers and Partners as a leader in his field. In Chambers and Partners 2014 Neil is praised for being '*very honourable and honest, with a broad base of knowledge and expertise*', while The Legal 500 states that Neil's advice is '*consistently precise*'.

Experience

Wills/Trusts

Specialist advice provided on all aspects of the drafting and subsequent implementation of Wills and regularly reviewing those Wills as required by our clients. The Wills range from the straightforward to the more involved including Wills designed to deal with agricultural and business assets and Wills designed to further a charitable or philanthropic intention. Much of our Will drafting and preparation is done as part and parcel of an overall inheritance tax planning strategy devised on behalf of our clients.



Specialist advice provided on the drafting, implementation and effect of discretionary trusts and non discretionary trusts for both our firm's existing high net worth clients and new clients in terms of the controlled distribution of their personal estates to chosen beneficiaries and as part of overall inheritance tax planning strategies. Some of those trusts have been established on death via a Will, while other trusts have been established during the lifetime of the Settlor.

For example:-

Succession and estate planning with the high net worth directors of a family controlled company on the implementation of Wills and other arrangements designed to protect the integrity and future success of the business while at the same time securing the financial wellbeing of the members of the individual family units of the various directors.

Advising the mediator in a dispute arising between the trustees of a Will Trust and the beneficiary of the Will Trust. The dispute involves the correct interpretation of particular clauses in the Will, the powers of the trustees in making loans to the beneficiary, the responsibilities of the trustees and beneficiary pursuant thereto and the potential liabilities of both trustees and beneficiary.

Advising the trustees of several high value and locally prestigious Will Trust administrations.

Probate and Estate Administrations

Specialist advice provided to executors and trustees in estate administrations ranging from multimillions GBP to more modestly valued estates.

For example:-

Advising the executors of a multimillion GBP estate in which a significant planning exercise has taken place regarding the availability of agricultural property relief and business property relief and thereby securing a significant reduction in the inheritance tax bill applicable to the estate.

Advising the executors of a million plus GBP estate in which the distribution thereof included both private individuals and charitable institutions.

Significant experience of handling estates in which there is foreign situ property. Our recent experience has brought us into contact with advisors in USA, South Africa, Australia, Spain and the Republic of Ireland. The foreign situ property has been a mixture of real and personal wealth and aspects of the relevant administrations have been contentious. Several of those administrations have been co-ordinated from Northern Ireland while in several we have acted as Northern Ireland counsel in respect of those assets and liabilities situated in Northern Ireland.

For example:-

Advising the executor and co-ordinating all aspects of the administration of a multimillion GBP estate in which personal assets were situated in Northern Ireland and both personal and corporate assets were situated in the USA.

Advising the executor in a large estate of unusual intricacy and tension in which the deceased's affairs were untidy at the time of death and in which assets were held in the UK and Europe. Co-ordinating all aspects of the administration from Northern Ireland.

Advising the administrator of a large estate in which the deceased died intestate leaving assets in the UK and the Republic of Ireland. Tracing the relevant beneficiaries of the estate to various other countries.

Mental Capacity

Specialist advice provided to clients regarding the nature, effect and implications of Enduring Powers of Attorney and Controllership Applications to the Office of Care and Protection.

Advising donors and attorneys on all aspects of the drafting and implementation process, together with applications to register Enduring Powers of Attorney in the Office of Care and Protection and subsequent applications to the Office of Care and Protection in respect of specific matters which have arisen post registration of the Enduring Power of Attorney.

Advising proposed controllers in relation to controllership applications to the Office of Care and Protection vis-à-vis the management of the patient's property and affairs including as appropriate the preparation of the relevant application paperwork. Advising proposed controllers in relation to their responsibilities and obligations and ongoing advice to the controllers appointed.