



OPEN TO REGULATED PRACTITIONERS ONLY

Private Client Practitioner of the Year

This category is open to Will writers, trust, estate planning and probate practitioners and solicitors

Introduced in 2024, this category recognises individuals who deliver exceptional all round service to clients. The Private Client Practitioner of the Year will demonstrate a deep technical understanding of the law, an innovative approach to service (including but not limited to relationship and rapport building/ referrals/ pricing/ service delivery/ client journey) and evidence of client satisfaction.

Importantly this category welcomes submissions from across the wills, probate, tax, trusts and estate planning community, recognising the diversity of the profession and the skills therein. The category welcomes submissions from sole practitioners through to individuals working in large legal teams with the winner rightly recognised as a leader and innovator in the profession.

Criteria

The winner of this award will:

- demonstrate technical excellence and best practice in the field of wills, probate, tax, trusts and estate planning.
- demonstrate an innovative approach to service, including but not limited to relationship and rapport building/ referrals/ pricing/ service delivery/ client journey.
- show a transparent and clear approach to pricing and to explaining costs and fees to clients.
- evidence the positive response of/tangible benefits to clients and stakeholders in this approach.
- show a proactive approach to risk mitigation process and protocols to protect clients.