

## Can your Will be ignored?

A recent Court of Appeal case concerning a Will has attracted a lot of media attention. One newspaper headline declared "Your Will can be ignored!" but it is not quite that simple.

A lady called Melita Jackson had one daughter, Heather Ilott, from whom she had been estranged for many years. Melita was adamant that when she died, her daughter should not receive any inheritance and so when Melita wrote her Will, she chose three charities that she wanted to benefit instead.

In general, an adult is free to leave their estate to whomever they choose. A 1975 Act of Parliament, however, allows certain people to make a claim in Court if they disagree with the inheritance they have been left. The rules are complicated but normally, up until now, the rule has always been that a child who is now an adult, who is financially independent, and who can work, would struggle to succeed in a claim.

Heather used the 1975 Act to challenge her mother's Will. She is on a very low income primarily made up of means tested benefits, however she is an adult and had been financially independent of her mother for many years prior to her death, therefore we would have expected her claim to fail.

Indeed, the case has been through many appeals with Heather being dissatisfied with the result initially achieved. The most recent appeal has been decided in her favour and has awarded her a sum of roughly 1/3rd of the total estate. The rationale behind the decision is that she is in financial need and that her deceased mother had no links with the charities she had chosen to benefit. The Judge stated that the charities had no need or expectation of inheritance because Melita had no links with them, and this outweighed the fact that Heather had no financial links with her mother prior to her death.

This decision has caused some alarm in the legal profession and for charities, who

rely on legacy income to maintain their work. It is possible for the charities to appeal the latest decision, and we will update you on this in a future newsletter if an appeal does go ahead.

**So what can you do if you want to make sure that a certain person doesn't receive anything when you die?**

1. Make sure you have a Will professionally drawn up for you – a homemade Will might be cheap but it cannot advise you!
2. Choose charities that you have links with, i.e. by making a regular donation or being a member of the charities you select.
3. Make a clear note of the reasons why you are excluding potential claimants.
4. Ensure that you do not confuse matters by providing for someone while you are alive and then excluding them after your death, or promising something to someone and then later changing your mind.
5. Above all, take professional legal advice and make sure you regularly update your Will.



We are pleased to announce that we are now able to offer pre-arranged out of hours appointments for clients who may find it difficult to attend during normal working hours.

To learn more about this service or to book an appointment please call us on:

 **01525 378177**



## MK DONNS - FRIENDS OF THE TRUST

We recently visited the MK Dons Football Stadium to find out a little bit more about the club on our doorstep, which has recently won its promotion to the Championship League.

We think that it is absolutely fantastic to have the MK Dons as our local team and have decided to pledge our support to them by becoming a Friend of the MK Dons Sport and Education Trust (MK Dons SET).



MK Dons SET is a charity linked to the club and they organise the delivery of work in five main streams: health, education, social inclusion, participation and football development. Each year the Trust helps over 50,000 adults and children benefit from activities such as holiday courses, match day clubs, study support, tackling obesity programmes, team coaching, mini soccer and multi-sports programmes. They are able to deliver this extensive range of activities in partnership with a range of agencies and organisations including Milton Keynes Council, NHS MK, local schools and junior football clubs.

Paul Lockhart, OMM's Practice Manager, had this to say, "Now the MK Dons have moved up into the Championship after winning promotion this is going to generate a larger following of the Dons and will hopefully just strengthen the great work they do in the community. Now OMM can play a part in supporting individuals through the MK Dons SET and we look forward to a long relationship with them"

To find out more information about the Trust please visit: [www.mkdonsset.com](http://www.mkdonsset.com)



## Leighton-Linslade in Bloom

OMM is once again proud to sponsor the Leighton-Linslade in Bloom campaign.

We have chosen a 3 tier planter to sponsor again this year which can be seen in the Market Cross area of the High Street (you can't miss it!)

Leighton-Linslade in Bloom is a charitable campaign that has been running for five years. The aim is to create lasting improvements to the local environment for the benefit of local residents, workers and visitors.



Our sponsored planter can be found in the Market Cross area of the High Street.

## 'OMMIVERSARY' CELEBRATIONS

OMM celebrated 35 years of being in business in August and staff were treated to a lovely meal at The Stag restaurant in Mentmore.

The firm's Founding Partners, Tom Osborne, Eric Morris and Peter Morgan, joined staff for the meal and there was champagne, speeches and toasts aplenty.

In the last 35 years we are proud to have scooped up various awards, including Best Small Business in Bedfordshire, and hope that for the next 35 years and beyond we can continue our excellent work.





Download a copy today!

## FREE LIFE MANAGEMENT PACK

**You never know what is around the corner but a few things in life are a certainty.**

The OMM Life Management Pack provides a central place of storage for all sorts of useful information such as insurance documents, bank information, and Utility companies.

Additionally, the Packs have a section covering vital health information which we all routinely fail to make our Next of Kin aware of until it is too late. Sometimes family members aren't aware of all the assets such as pensions or policies that their loved one may have owned and this can cause difficulty when trying to manage an estate before distribution. The Pack can cover all of this, as well as giving details such as who should be informed of your death and any specific burial wishes that you may have.

You can download a copy of the life management pack completely free of charge by visiting our website: [www.ommlaw.co.uk/OMM-Life-Pack-new.pdf](http://www.ommlaw.co.uk/OMM-Life-Pack-new.pdf)

Alternatively, feel free to drop by our offices and we will be more than happy to provide a pre-printed version for you.



## FSB AWARDS

In the Summer 2015 newsletter we announced that OMM had been selected as finalists in three categories at this year's FSB Bedfordshire Business Awards.

We are now pleased to announce that that we were awarded the 'runner up' certificate in the category of 'Training & Development'.

This is an achievement that we are very proud of and we hope to continue adding to our awards collection in the future!



## Adam's AAT Achievement!

Adam Hornett, an Accounts Department Assistant here at OMM, has successfully completed Level 2 of the AAT Accounting Qualification.



The Association of Accounting Technicians (AAT) is the leading awarding body for the accounting sector, AAT qualifications are recognised around the

world as evidence of capability.

It took Adam less than a year to achieve this qualification and he intends on studying towards the more advanced Level 3 qualification in the very near future.



## BUSINESS NETWORKING EVENT

Wednesday 5th October 2015  
10:00am - 12.00

The Leighton Buzzard Business Briefing & Networking event is designed to bring together local businesses for an informative and topical business update with the chance to network with like-minded professionals.

Our briefing and networking event, hosted in collaboration with Clark Howes, is held on the first Wednesday of every other month.



NEW VENUE!

We would be delighted if you could join us at our new venue:

**The Leighton Buzzard Golf Club**  
Plantation Road  
Leighton Buzzard  
Bedfordshire  
LU7 3JF

See you there!

# FREE

# FAMILY LAW CLINIC

Come along to one of our walk-in appointments for an initial 15 minute chat

*Our solicitors can make a difference*

## Services include:

- FAMILY
- TRUST FUNDS
- MEDICAL NEGLIGENCE
- COURT OF PROTECTION
- WILLS & PROBATE
- LASTING POWERS OF ATTORNEY

**Clinic  
every last  
Thursday of  
the month**

**om  
&m** | osborne  
morris &  
morgan  
solicitors

Danbury House  
West Street  
Leighton Buzzard  
Bedfordshire LU7 1EP  
T 01525 378177  
F 01525 851006  
E [info@ommlaw.co.uk](mailto:info@ommlaw.co.uk)

OFFICE HOURS  
Monday - Friday  
9.00am - 5.30pm

[www.ommlaw.co.uk](http://www.ommlaw.co.uk)