

## **Antony Brinkman**



### 1. How long have you been an estate planner?

I entered the Estate Planning industry in 1999 when I established The Willwriting Partnership with my two other partners.

### 2. Brief profile

I became an elected member of The Society of Will Writers and Estate Planning Practitioners in 2008, and in 2014 took the decision to volunteer my time as the regional Chairman for the North West, on behalf of members in my area and in an effort to help increase the knowledge and standards of my group members. I have delivered presentations on Estate Planning to thousands of people over the last several years, have appeared on Radio and in social media, bringing the merits of using specialist Estate Planners to the general public. STEP qualified, I have trained will writers, solicitors, financial advisers and accountants in Estate Planning best practices.

### 3. Why you joined the PSB?

As a member of the Professional Standards Board, I now aim to help increase the overall standards of the industry at large, and agreed to become the Chair of the Board due to my considerable experience.

## Nick Ash



1. How long you have been an estate planner?

14 years

2. Brief profile

In September 2005 I was made redundant. No job, no savings and a Wife and two kids to feed. I didn't know what I wanted to do, but I wanted to do it for myself. Fourteen years later Will & Probate Services is one of the most respected firms in the paralegal sector. I am well respected amongst my peers, a Fellow of the Institute of Paralegals, Chair of the TAS Network of Independent Will Writers, Lecture in six topics for the Chartered Institute of Legal Executives and have a post on our own Professional Standards Board. I think I did OK.

I still have the Wife and two kids to support (apparently the bank of Mum and Dad never closes) but it is easier these days. In the moments when I am not working, I like to ride my bike, or sometimes my tandem with my wife.

3. Why you joined the PSB?

I have always been keen to give something back to the profession, to share my knowledge and experience. I have been a member of the Society since I started in business and have served on the joint SWW and IPW steering committee that looked at the regulation of the sector back in 2014. Trust and Professionalism are core values within my own business and I want to see them instilled across the whole of our industry. Working with the PSB and the Society presents us with the opportunity to do this.

## Shandip Shah



### 1. How long have you been an estate planner?

I have been an estate planner for 7 years now, with experience in banking and pharmacy retail management for 30 years prior to this. I am based in Harrow, Middlesex.

### 2. Brief profile

Born in Tanzania but am of Indian origin. I have been in the UK for the last 43 years. I am married with twin 16 year olds (B&G). Key interests include sport – playing and watching, charity work (am a Trustee of major charity promoting humanitarian and other development work), run a spiritual school every week and generally love life as a whole. I am a keen reader and music lover (all genres).

My firm Balance Consultancy is based in Stanmore with clients all over England but mainly within London. I thoroughly enjoy my work and get huge satisfaction from helping people. I am the chair of Middlesex and West London regional group.

### 3. Why you joined the PSB?

I was on the previous PSB and my aim has always been to raise the standards of the industry and be part of the change. For me consumer protection and keeping consumers at the forefront of all change is vitally important particularly with what we do. PSB can be a positive force for change and raise the bar in our industry and I want to be part of that change.

## Sara Sheppard TEP MSWW



### 1. How long have you been an estate planner?

I have been dealing with Wills, Powers of Attorney, Estates, Trusts and Court of Protection work for over 30 years, starting with NatWest Investments in Kent, and after being made redundant in 2000, moved into private practice with various firms of solicitors in Kent. I became a Trust and Estate Practitioner with the Society of Trust and Estate Practitioners in 2003, a qualification which I still maintain today.

### 2. Brief profile

In 2017, I decided to leave private practice and set up my own Will-writing business (SLS Wills and More), again operating in Kent, and work with elderly clients and their families to provide a friendly caring service to clients in their own homes, rather than them having to find and travel to a solicitor.

I joined The Society of Will Writers in June 2017 and have continued to expand my knowledge through training and Continuing Professional Development. I also attend most meetings of my Regional Group.

Outside work, I am a District Safeguarding Officer for St John Ambulance and in that role have become a registered safeguarding trainer (having obtained PTLLS qualification in 2014). I am passionate about protecting those who lack capacity and providing support and information to their families and carers where required. I live near Canterbury with my husband Ian, one of my 2 children (now adults), and 2 dogs. I also enjoy walking and reading (when the opportunity allows).

### 3. Why you joined the PSB?

I am passionate about protecting vulnerable adults and want to be part of something that improves standards amongst practitioners, and to promote good standards to not only to members of SWW, but also other professionals and to the public at large.

## Julie Memmory



1. How long have you been an estate planner?

10 years

2. Brief profile

I was born and raised in Cheshire but moved to Norfolk 19 years ago. I studied Law at the University of Hull. After completing my degree, I attended the College of Law in Chester where I successfully completed the Legal Practice Certificate.

I have two children, now grown up, and after spending a few years as a stay at home mum I decided it was time to get back into the world of work.

Prior to starting my Estate Planning & Will Writing business I worked as a compliance Officer at a directly authorised mortgage and insurance brokers. A few years ago I decided to take some more exams and train to become a mortgage and insurance adviser.

3. Why you joined the PSB?

I am looking forward to the challenge of working on the PSB to help raise standards across the Will Writing profession and to promote the aims of the Society to the public.

## Colin James



1. How long have you been an estate planner?

Twelve years

2. Brief profile

I am the Regional Chairman for the Yorkshire Regional Group and have been an active member of the SWW since 2007. I am an active member of the SWW attending both the Yorkshire group in my chairman capacity as well as the East Midlands group under a membership capacity. I have attended a number of courses from The College of Will Writing and I am passionate about driving the profession forward.

3. Why you joined the PSB

I joined the PSB because I wanted to influence how standards in the profession could be improved and how the Society could further improve the assistance to and development of new members to the Society.

## David Silvester



### 1. How long have you been an estate planner?

17 years in total with the last 12 years running my own business.

### 2. Brief Profile

I live in Edinburgh, Scotland and I have been a member of the Society for approx. 17 years, trading as my own willwriting company for the last 12 years. I have been a past member of the Executive Council and currently sit on the PSB.

### 3. Why you joined the PSB?

My aims are to strive to help maintain and improve the status and competence of willwriting as a profession (when I'm not on the golf course!).

## Jim Martin



### 1. How long have you been an estate planner?

I have been an estate planner for 20 years and a member of the society for 15 years and I currently run DN6 Estate Planning.

### 2. Brief Profile

I became involved in estate planning in 1999 when I became an IFA as in my view the 2 are closely linked.

The Estate Planning side has become more important over the last few years and I find I am drafting and registering and lot more Lasting Powers of Attorney. I am also a firm believer in the need to have a professionally and accurately drafted Will.

### 3. Why you joined the PSB?

I joined the PSB to raise the profile of the Society both with the members and with the public at large.



## Atul Jobanputra



### 1. How long have you been an estate planner?

I set up my company in May 2016. I am a one-man-band operation based in the East Midlands.

### 2. Brief Profile

Before starting this business, I was a Sub Postmaster for nineteen years running a village post office and convenience store and prior to that, I managed a branch for Alliance & Leicester Building Society.

I have always been interested in serving the local and general communities by taking on volunteer positions with various organisations where I feel my skills and experience can assist in making improvements to our private and work lives. This is the primary reason for joining the PSB. I also find that these extra activities help me improve as a person and add to my wellbeing.

In addition to being part of the PSB, I am a Justice of the Peace, I chair for the Valuation Tribunal England, I am a member of my local Parish Council and treasurer for a Library co-op.

### 3. Why you joined the PSB?

It is an honour to be part of part of the PSB and I hope to do justice to the small part I may play in establishing this body.

## Nicola Combe



### 1. How long have you been an estate planner?

I started as an Estate Planner in early 2019, when I set up Morecambe Bay Wills and Estates Limited

### 2. Brief Profile

I previously had a long career in insurance and digital transformation, with senior roles in operations, change management and systems implementation. I have worked globally and have extensive corporate experience, but took a career break in 2018 when my husband, Jim, became ill with cancer. During this time we experienced firsthand the challenges that arise when your Will isn't up to date, you don't have Powers of Attorney, and you didn't know the consequences of some financial actions on Inheritance Tax liability.

After I lost Jim, I decided to change career and make it my mission to educate others and try to ensure that they understood the consequences that could be faced. And to do this in an affordable and charitable way. I firmly believe finance shouldn't be a barrier to getting great, professional advice at a price you can afford. And I make sure we give back through charity donations from every fee and support our local community.

Outside work, I volunteer for two local charities – a local community garden we transformed from a derelict site, and a local women's social enterprise focussed on providing women skills and training to get them back into work and business. I also run their weekly Drop In, and their mentoring programme – every new business owner in our start up course gets a mentor for a year, so there's always lots to do!

Why you joined the PSB?

It is an honour to be part of part of the PSB and I hope to do justice to the small part I may play in establishing this body.

### 3. Why you joined the PSB?

I love sharing knowledge! And I have lots of skills and experience that come in handy when setting up a new business or working out "how to work"! I've spent a lot of time in process optimisation and systems support roles so know how to make these work together efficiently. I am thrilled to be asked to join the PSB as I hope I can use these skills to help our members make their own ways of working more efficient and effective.

