



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 business 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 fellow group members. I have delivered presentations on Estate Planning to thousands of people over the last several years, have appeared on Radio, TV and 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. I also host the Estate Planners Podcast with episodes released fortnightly to further assist practitioners with tips, tools and technicalities to best help their clients.

3. Why you joined the PSB?

As a member of the Professional Standards Board, I am dedicated to helping to raise standards in our profession, and in 2019 agreed to become the Chair of the Board.



SIMON BRIMAGE

1. How long have you been an estate planner?

27 years

2. Brief Profile

A financial adviser by profession from 1995, Simon entered the industry of estate planning and will writing, alongside being a financial adviser, in 1997.

Simon has a big heart and has put his 27 years in the industry to good use by successfully dedicating himself to things which are for the greater good of others by supporting the Legal Services industry, business owners, charities and social/legislative change relating to key issues that affect terminally ill and vulnerable people in the UK. Simon's experience through qualification, and tenure in business, finance and the legal aspects of a person's life journey, is harmonised with his strategic approach to bringing all aspects together and creating a robust legal framework for his clients.

This dedication to advising, supporting, and helping others has been noticed by industry peers and rewarded in many ways, several of which are listed below:

- House of Lords Parliamentary Adviser
- Parliamentary projects: Legalisation of Assisted Dying and the Reform of The Wills Act 1837: Revocation of a Will on Marriage/Civil Partnership.
- Director of Wills and Trusts UK
- Vice Chairman of the PSB, 2019 - present
- Fellow of the Society of Will Writers
- STEP Member
- Estate Planning Consultant of the Year 2022 Highly Commended, The British Wills and Probate Awards
- Industry Judge 2023 The British Wills and Probate Awards
- Industry Judge 2024 The British Wills and Probate Awards
- Industry Judge 2024 Modern Law Private Client Awards
- Industry Judge 2024 Modern Law Awards (London)
- Business Adviser and Non-Executive Director to a number of successful businesses
- Advocate of the 'Bauer Media's Cash for Kids' Charity
- Advocate of 'Be My Eyes' (helping blind people worldwide)

3. Why you joined the PSB?

Helping and guiding others is part of Simon's DNA and utilising his knowledge and experience to help drive higher standards across the industry is something that he is passionate about. Working as part of a team with dedicated PSB board members, having a shared goal, and adding value to that team for the benefit of other Estate Planners, and ultimately the public, is something that drives Simon. So, joining the PSB was an effective way of making this happen and it has exceeded his expectations.



ANN-MARIE SHINE-NEWTON

1. How long have you been an estate planner?

My Estate Planning career started in January 2017 when I joined the Society of Wills Writers.

2. Brief Profile

When I started out in the Estate Planning industry, I worked with other firms in one in Coventry, a Solicitors in Brighton, a local award-winning firm in Worthing drafting for other professionals all before Lion Wills and Estate Planning was born in early 2023 which is my own business.

I work with clients all over England and Wales, getting their affairs in order. Educating people on the importance of Lasting Power of Attorney and Wills and the devastation for families if the right documents aren't put in place. Visiting clients in their own homes where they feel comfortable to have open and honest conversations about their personal lives and affairs is one of the best parts of this job.

I work with a couple of charities based in Worthing to help raise awareness of the importance of charitable gifting and legacies in Wills.

Continual Professional Development is a requirement of being a member of the SWW, this is something I thoroughly enjoy & thrive on the learning element of this role.

Some of my previous roles were in recruitment where I loved to help people into work, sales training manager and owning and running a champagne shop in Brighton!

3. Why you joined the PSB?

I have been impressed with the work that is carried out by the PSB and wanted to help them make a difference in raising the standards within our industry. Helping the SWW with their aims in educating their members in offering a great service to clients. Protection of the public is at the forefront of the PSB aims and I am looking forward to helping achieve this.



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.



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?

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

2. Brief Profile

I am in Edinburgh, Scotland where I have lived for 45 years and I have been a member of the Society for approx. 22 years, trading as my own will writing company for the last 17 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 will writing as a profession (when I'm not on the golf course!). In Scotland we have different succession laws to England, and it is important to give a balance for all Members of the Society / Industry.



HELEN ALGAR

1. How long have you been an estate planner?

I have been an estate planner and a member of the Society of Will Writers since April 2019, and this follows a 20-year career, where I worked in Private Client departments within a few Suffolk law firms.

2. Brief profile

I have lived in Suffolk all my life, and am married with twin boys. In my spare time I enjoy walking and live music, and am currently the vice-chair at the Executive Committee for our local Scout Group, which my children attend.

My career in Solicitor's Offices began in the late 1990s when I had my first job as an Office Junior. Afterwards, I worked as a Legal Secretary in the Private Client Department and then soon after was given the opportunity to take on my own caseload of clients and work, in conjunction with my training.

Fast forward to 2019, I left my last position at a law firm in Ipswich, with the ambition to work for myself, and I established Suffolk Will Services. I love seeing clients in their own homes, where they are most comfortable, to have those personal conversations.

3. Why you joined the PSB?

I consider myself to be very lucky to have had the support and guidance from fantastic mentors during my training years, and there is always something new to learn. I am passionate about raising standards in the Will Writing industry and I hope, in my own way, that being a member of the PSB I can pay it forward with the support I can give others.



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.



JULIE MEMMORY

1. How long have you been an estate planner?

I set up my own estate planning business in 2008.

2. Brief Profile

I was born and raised in Cheshire, but my journey led me to Dereham, Norfolk, around two decades ago. My academic path took me to the University of Hull, where I pursued a degree in Law. Following my undergraduate studies, I continued my legal education at the College of Law in Chester, where I successfully completed the Legal Practice Course. Before launching my Estate Planning & Will Writing business, I served as a Compliance Officer at a directly authorised mortgage and insurance brokerage. Over the last couple of years, I have been studying hard for the STEP (Society of Trust and Estate Practitioners) Diploma and am pleased to say I was awarded the TEP (Trust and Estate Practitioner) status in February 2024.

3. Why you joined the PSB?

I originally joined the Board in 2016 because I was keen to be involved in improving the standards within the profession and to help raise the profile of the Society.



NICK ASH

1. How long you have been an estate planner?

18 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. Eighteen years later W & P Legal is one of the most respected firms in the paralegal sector. We are an award winning employer with over 20 staff. I am well respected amongst my peers, a Fellow of both the Society and the Institute of Paralegals, Full member of STEP, on the management team of the TAS Network of Independent Will Writers, Lecture in six topics for the Chartered Institute of Legal Executives, run two popular courses at the College of Will Writing 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. Since joining the PSB I have taken responsibility for complaints against members, which has morphed into a lead role in the oversight and governance of the membership. I authored both the new oversight and governance and complaints sections of the revised code of practice and the PSB's response to the CMA investigation of the sector. Together with the PSB Chair we are in the process of forming a cross industry steering group to look at the future governance of the sector.



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!

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.



SARA SHEPPARD

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 am also the Chair of my Regional Group. Outside work, I volunteer for St John Ambulance in their Safeguarding Team (though I have been a first aider and youth leader in the past) and in that role have become a registered safeguarding trainer (having obtained PTLIS 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.



SHANDIP SHAH

1. How long have you been an estate planner?

I have been an estate planner for nearly 12 years now, with experience in banking and pharmacy retail management for 30 years prior to this. I am live and work in the Borough of Harrow, Middlesex.

2. Brief profile

Born in Tanzania but am of Indian origin. I have been in the UK for the last 48 years. I am married with twin 21 year olds (B&G). Key interests include sport – playing and watching, charity work - am a Trustee of the largest Jain community in the UK – Oshwal promoting Jain values (non violence to all). Generally love life as a whole. I am a keen reader and music lover (all genres). My firm Balance Consultancy Ltd 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. I am delighted with this role and how much progress this group has made over the years. We have around 10 meetings a year and always have very good attendance and speakers. It has been a joy to mentor a few of the members over the years and see them now thrive in this industry.

As a result of my work, I have had an opportunity to impart information on wills and LPAs and estate planning in general to the public. I generally do 5-6 talks a year on invitation only. My regular sessions four times a year at the wonderfully inspiring St Lukes Hospice in Brent. They do an incredible job there and legacies left to them form a sizeable percentage of their total income and I am delighted to have been part of this for the past 7 years. This is my way of giving back to the local community.

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 education and knowledge for all practitioners in this industry is of paramount importance in what we do. Knowledge is king. Also 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.

One recent role has been the mentoring initiative. This has given me huge satisfaction to guide a newbie in our industry and hopefully help them succeed in their chosen path of will writing and estate planning. Huge credit to the team leaders Nicola Coombe and Sara Shephard on the hard work they have put in to put together the plans. I have also been the main contact for all regional chairs and have worked on other projects over the years on the PSB. 'Team PSB' are a great bunch of like minded individuals who want to do best for the industry as a whole and raise standards led very professionally by Antony Brinkman.



VANESSA ST JOHN

1. How long have you been an Estate Planner?

12 years: working for two national companies prior to setting up TLB Planning Ltd in May 2019.

2. Brief Profile

During my 10 years of working as a Business Manager at Lloyds Bank, I sat my mortgage exams and in 2004, I left Lloyds and set up my own mortgage practice, offering both residential and commercial mortgage lending. Sadly, following the downturn in the economy in 2008 and the fact that the banks shut up shop and stopped lending, I eventually decided to close that business.

In 2011, I was offered a role to train as an Estate Planner and having taken time to fully learn my trade, preferring to work for myself, I left in 2019 and set up on my own. Four years later, the business has grown where we now have two part time Administrators and two self-employed Estate Planners who work under my umbrella.

One of the most amazing parts of my job has meant that I have been able to work with Maggie's Cancer Trust in Swansea. Pre covid, we had a drop in centre where I gave my time freely to advise those living with life limiting cancer, helping them plan for a time when they are no longer here. That role has changed since covid and I now offer a free telephone consultation to anyone referred from the centre who needs help and advice. It is an absolute privilege to work with Maggie's Centre Users (they are never referred to as patients) and I am always in awe of the positive mental attitudes of the people I speak to, even when they only have days left to live.

3. Why you joined the PSB?

Over the years, I have met some Estate Planners who give excellent advice – and I have also met some that don't! There's a lot of 'misinformation' out there and I believe that writing your Will and Lasting Powers of Attorney are one of the most important things you can ever do for your loved ones. I am confident that as part of the PSB, together, we can ensure that all clients have access to the best possible advice.