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#### Andrea Zavos, Senior Partner

Boodle Hatfield continues to go from strength to strength - we have had another extremely successful year with growth in all our core areas. We continue to build up our presence in key sectors and have made investments into all of our teams. This approach is made possible by the fantastic ideas from our Partners and staff and through their exceptional talent and hard work we are able to deliver real progress. As a Trainee with us you will have access to all of this and the opportunity to be a part of our continuing success.



#### **Graham Winkley,** Training Principle

I started my career at Boodle Hatfield as a Trainee many years ago, this has come full circle and I am now the Training Partner here. Each year we welcome bright and engaging Trainees, we invest in their personal and professional development and we get to see them grow in confidence and ability. Having been a Trainee here I understand the pressures our Trainees can face, I spend time getting to know each of our Trainees during their Training Contract and am available to them throughout as a sounding board or even their Supervisor. Our Trainees get to work in an environment that is engaging and friendly and with approachable colleagues.

### Who we are & how we started.

#### Our history

The firm began when our founder, Robert Andrews, worked for the Grosvenor family in the county of Cheshire in 1722, and soon followed them to London to advise them on the development and management of the London estates. We continued to advise the Grosvenor family in the eighteenth and nineteenth centuries on the development of their Mayfair and Belgravia estates, which saw them transform from countryside to the elegant streets and squares we see today.

#### Our success

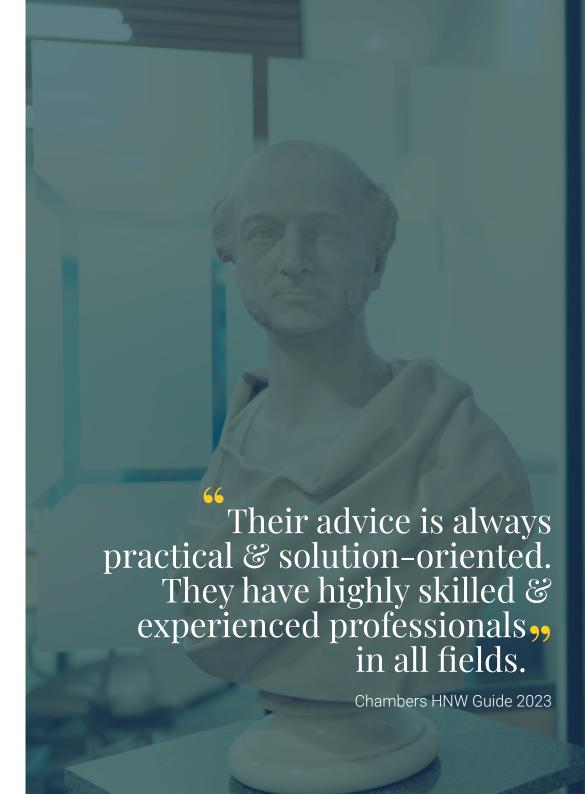
The ability to truly understand individuals, families, property owners and businesses and their individual needs has enabled the firm to provide a high quality service for three decades. Through booms, downturns and recessions, Boodle Hatfield lawyers have worked alongside clients in all manner of situations.

We have grown our substantial practice over the years, which has enabled us to service a full spectrum of clients both domestically and internationally from our offices in London and Oxford.

#### Our future

There has been an increasing focus on international work, advising entrepreneurial clients and family offices. This complements our long-standing work for some of the largest landed estates and family businesses in the UK.

Our history remains at the heart of who we are and we value the longstanding relationships we have nurtured with clients over centuries. We balance this with a modern and agile approach and entrepreneurial attitude which enables us to attract and service new clients in existing and emerging areas and regions that complement our business. Whether it's advice on property, business or private wealth issues, the firm provides the right guidance to enable its clients to succeed today and in the future.



### What we do.

Our clients come from a wide range of sectors, both in the UK and internationally, and include some of the most well established owner-managed businesses and property companies as well as fast-growing entrepreneurial enterprises and ultra-high net worth families.

Our chief priority is helping our clients achieve their commercial objectives, whatever form their business takes. We offer expert legal advice from our five departments - Private Client and Tax, Property, Corporate, Family and Litigation.

#### **Private Client & Tax**

Boodle Hatfield has a first class reputation for providing practical, effective and innovative legal advice for wealthy individuals and families, family businesses, landed estates, trustees and family offices, both in the UK and internationally.

We are recognised as one of the leading private client firms in the UK, with a large domestic and international client base. We have long standing relationships with clients based within and outside the UK in relation to their interests in jurisdictions all over the world. We have advised many of our clients for several generations and focus on growing, protecting and transferring wealth between generations.

#### **Property**

Property is at the core of what we do for leading families and investment companies. While our main market is London, we have vast experience advising international and UK-based investors on deals throughout the UK across a broad range of sectors including Residential, Hotels & Leisure, Urban Regeneration, Landed Estates. Industrial and Offices.

With approximately 35 specialist property lawyers, including experts in residential, construction, funding, tax and litigation, our Property department acts for a wide variety of landowners, investors, developers, funders and residential occupiers.

#### **Corporate & Commercial**

Our growing corporate team acts for businesses and their corporate or individual owners, providing solutions that help those owners to operate their businesses successfully, whether they are starting a new project or managing a multi-national family business.

Our corporate clients are high-net-worth individuals, entrepreneurs and their private and family businesses, established household names, fast growing and developing companies and smaller quoted companies. We have experience in a wide range of industries such as property companies, investment funds, luxury assets, technology and the Hotels & Leisure sector.

#### Litigation

The Litigation team is known for its expertise in commercial, property and art litigation. We have the breadth and depth of experience and expertise to resolve clients' problems, whether domestic or international.

Our commercial specialists guide our clients on issues around contract disputes, professional negligence, partnership disputes and civil fraud. Our property experts provide advice over a wide range of disputessuch as breaches of covenants, lease renewals, forfeiture, and possession of land and tenant insolvency. Our art experts provide advice on disputes over ownership, authenticity and provenance, misattributed or damaged artwork, restitution or holocaust claims, art fraud, loss of sale and associated losses, and breach of contract.

#### **Family**

Our Family team is going from strength to strength, providing effective and sensible advice to individuals, families and trustees on the full range of family law issues.

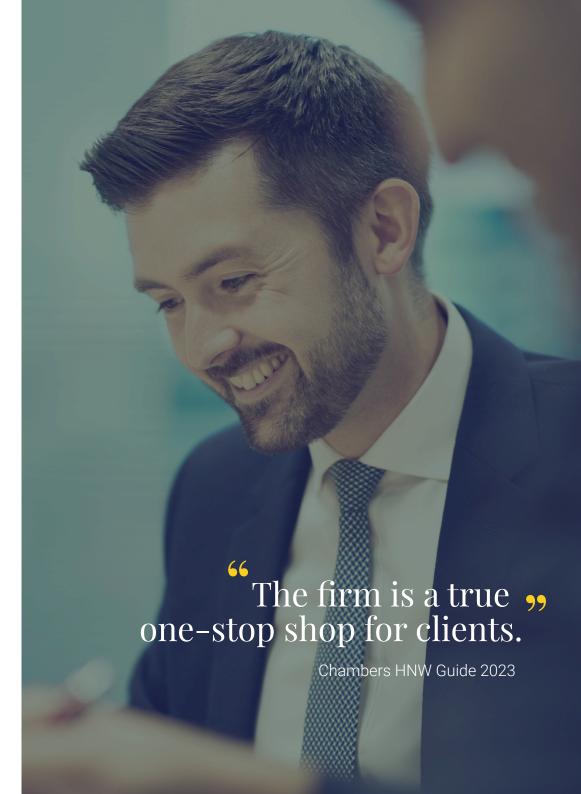
If a marriage does break down we can advise our clients on all aspects of divorce including general procedure, the division of finances and issues concerning children such as contact, residence and relocation.

We also give pre-emptive advice intended to maximise wealth protection against the possibility of divorce. The team advises on some very complex and high value cases with an increasing number having an international element to them.

#### **Specialist Areas**

The firm has specialist expertise in the following sectors:

- Family offices we advise family offices from landed estates to those of international HNWIs who wish to run their affairs from inside or outside the UK.
- Entrepreneurs & Investors (Drive) we work with successful people on managing their businesses from start- up to exit and on the related private wealth planning, as well as advising on investments into entrepreneurial companies.
- Family Businesses we have a long history of advising the owners of some very established family businesses in the UK and internationally, providing a holistic service from governance and succession planning, business investments, resolving disputes and philanthropy.
- Arts & culture we advise on all aspects of arts and cultural property from tax efficient planning (including major conditional exemption claims) to litigation around the provenance or authenticity of Old Masters or disputes around Street Art.
- Hotels & Leisure we have a long history of working with the owners, managers and investors in the hotel & leisure sector advising on the acquisition, development and/or refurbishment of hotels, nightclubs and restaurants, both in mixed-use developments and stand-alone projects.





### Life at Boodle Hatfield.

#### Before you start

Once you have accepted your Training Contract we will introduce you to your fellow Trainee intake so that you can start building your contacts from very early on. From then on you will be invited to join us at our annual events including the Summer and Christmas parties. These are a great opportunity for you to get to know your peers and become familiar with the firm before your first day.

#### Once you have joined us

Boodle Hatfield organises a number of firm wide social events through the year including football and netball. These events and others such as end of month drinks, baking competitions, quiz nights and more are open to everyone.

You are encouraged to participate in activities with clients and other firms including annual cricket, mixed netball and dodgeball matches, as well as the highly rated annual table football tournament. We value the contribution that all of our staff can make to strengthening client relationships.

We recognise the importance of a healthy work-life balance. Everyone is encouraged to use their time effectively whilst at work and pursue personal interests outside of work.

I wasn't sat on the 59 sidelines doing printing.

Chambers Student 2023

## Being a trainee at Boodle Hatfield.

#### Small intake

We recruit between four and five Trainees to join us each year. Our Trainees value being part of a smaller intake in our non-hierarchical structure; taking a greater deal of client contact and more responsibility than in many other firms. They also find this environment helps the relationships that they form with people at all levels across the firm. There is also a strong support and social network across the trainee levels.

#### Choosing seats

We have five main areas of specialism which are: Private Wealth, Property, Corporate, Litigation and Family. As a Trainee, you will be asked which seats you would like to complete during your two year training contract and, where possible, we will try to place you in seats which best match your career aspirations, whilst ensuring you have a balanced training contract and meet the SRA requirements.

Trainees will usually complete two Property seats and must complete a contentious seat which would be in the Litigation or Family teams.

You will spend six months in each seat with the potential to complete a Private Client and Tax seat in our Oxford office.

Boodle Hatfield is renowned for the high quality of its training. All Trainees are involved in client work from the start and, with the appropriate supervision, from an early stage are encouraged to handle their own files personally.

Trainees have a formal appraisal with their supervisor every three months. These meetings give Trainees the chance to discuss their progress and to indicate where more can be done to help with their training and development. In addition, the firm's Training Principal and HR Department are always available to discuss training matters and any other issues that may arise.

#### Staying on after qualification

Wherever possible, we recruit solicitors from our qualifying Trainees. We discuss preferences with our Trainees at the start of the qualification process and, where possible, seek to offer our Trainees places in their practice areas of choice.

We are extremely proud that over the years we have maintained a Trainee retention rate of between 75%-100%. Retaining and developing our talent is important to us and we are delighted that consistently around 20% of our Partnership is made up from Partners who started with us as Trainees.

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The breadth of matters that you work on & the quality of work that you are given as a trainee is really unique. 99

Anna Karan, Associate & Former Trainee



### A day in the life of a trainee.

Will Timbrell provides his account of a day in the life of a Property trainee.

9am, arrival – I arrive at the office at around 9am each day. On the way through to my office, I pass my deputy supervisor's office, so I often pop my head in for a quick chat before the day begins. Today is a Tuesday, which is when Boodle Hatfield's five-a-side football team plays in the evening against local firms and companies, so I pop my head in to a senior associate's office to speculate on the team's chances of scraping a win.

Trainees are also lucky enough to share an office with a partner, and in my case it's the residential property and training partner, Graham. We too have a brief catch up on events as we log in to our laptops before starting the day.

### TRAINEES ARE ALSO LUCKY ENOUGH TO SHARE AN OFFICE WITH A PARTNER

Arriving at 9am allows me to sketch out a rough plan for the day's work as organising my tasks and keeping a keen eye on priorities is essential.

After sketching out my plan for the day, I begin with my first task.

Remainder of the morning – the morning is usually spent working on the highest priority task on my list. The majority of said tasks will often involve drafting documents such as leases, licences and notices. From early on you are given the opportunity to draft significant documents relating to some very high-value, beautiful residential buildings in central London, which is a large responsibility, but very fulfilling. Obviously, everything is checked by one of my supervisors!

### FROM EARLY ON YOU ARE GIVEN THE OPPORTUNITY TO DRAFT SIGNIFICANT DOCUMENTS

However, it must be noted that most mornings cannot be dedicated solely to the task of drafting. A high number of emails are received from clients each day, so it is important to manage one's inbox and respond to client emails promptly. This results in many mornings being spent on tasks that were not originally in the days plan: versatility is an essential skill in the Property Department.

**1-2pm, lunch** – I tend to have lunch with the other trainees from 1-2pm. There are 9 of us in total (5 in my year and 4 in the year above), and we often each lunch together, so on most days there are at least 3-4 of us who will embark on a short trip to pick up some lunch and return to dine in the firm's lunch area. The office is a short walk from the Tate Modern and the Thames, so on sunnier days, we opt to eat lunch sat on a bench looking across the Thames at St Paul's and the City.

Early afternoon: I often spend early afternoons managing the matters that I am responsible for (with the appropriate supervision). There are many matters that require attention, so note taking and diarising are extremely important to enable the transactions to run smoothly. One notable example was on the sale of a freehold property in an exclusive area of London, which involved me drafting the necessary documentation, taking instructions from the client and liaising with the buyer's solicitor and the estate agent. Tasks like this provide a great opportunity to build rapport with the client through direct correspondence (both telephone and email), and to practice emailing with the opposing solicitors. The Property seat provides a range of scenarios so sometimes you may work with the other side to get a transaction moving, and other times there will be stronger negotiation required – both are essential skills and the Property seat allows you to shape these in practice.

SOMETIMES YOU MAY WORK WITH THE OTHER SIDE TO GET A TRANSACTION MOVING, AND OTHER TIMES THERE WILL BE STRONGER NEGOTIATION REQUIRED – BOTH ARE ESSENTIAL SKILLS AND THE PROPERTY SEAT ALLOWS YOU TO SHAPE THESE IN PRACTICE

**Late afternoon**: as the working day nears an end and emails start to subside, I use the opportunity to complete more drafting. Drafting is satisfying but requires great attention to detail and strong concentration, especially if the matter has unique intricacies. However, again, this is very useful training because there is plenty of drafting to be done so skills will be picked up and practiced regularly.

**End of the day:** when the tasks for the day are complete, it is time to get changed for the highly anticipated five-a-side match with other members of the firm, followed by a celebratory/consolatory shandy with the team.





### A typical week as a trainee.

Sophie Mellor began her training contract in 2021 and outlines her typical working week in a Private Client & Tax seat.

A **Monday** morning typically involves going through my to-do list and calendar and planning my week as best I can (as unexpected work often comes in and changes my plans). I will often check in with a partner or associate who I work closely with to catch up on ongoing matters we are working on and discuss next steps. I will then get started on my to-do list and make sure that I have a productive start to the week.

On a **Tuesday**, I attend the Private Client & Tax Team meeting which tends to involves a catch up and a discussion around new or impending legislation that the team should be aware of. Every other Tuesday, I attend the cryptocurrency working group meeting during which we discuss what is going on in the crypto/legal market, events that we have attended and opportunities on the horizon, content and insight ideas, and more.

As a trainee in Private Client & Tax, my workload varies between more pressing tasks and assisting with ongoing matters. Throughout the week, I will typically do a lot of drafting including wills, codicils, deeds, declarations of trust, powers of attorney and co-ownership agreements. Other common tasks include legal research tasks, attending meetings with other fee earners and taking attendance notes, drafting inheritance tax forms and assisting with the administration of an estate. I also assist the contentious Private Client & Tax team which can involve liaising with the Court, filing documents online and in person, serving the other side with documents and proofreading documents such as witness statements and expert reports.

Aside from work, I will grab a coffee and go for a walk with the other trainee in the Private Client & Tax team almost every day, or we will have lunch in a communal area in the office with all of the other trainees. On a **Wednesday** or **Thursday** I often get the chance to attend an external networking event, some recent venues being the Tower of London and the National Gallery and in a few weeks I am attending an event at Somerset House.

I OFTEN GET THE CHANCE TO ATTEND AN EXTERNAL NETWORKING EVENT, SOME RECENT VENUES BEING THE TOWER OF LONDON, THE NATIONAL GALLERY & SOMERSET HOUSE.

By **Friday**, hopefully I have ticked most things off my to-do list, but I will make sure any pressing tasks are finalised ready for the weekend (and the next influx of work). If I have the time on a Friday afternoon, I will often research and draft an article for the Digital Assets or Art Law team, which I then proofread and send to a partner for approval. A Friday often ends with attending the firm's "wine club".

### From Trainee to Partnership.

With over 30 years' combined experience between them, three female partners - Harriet Errington, Katie O'Callaghan & Kellie Jones, share their evolution from trainees at the Firm to joining the partnership.

They outline some of their tips for future trainees embarking on their journeys, highlighting their thoughts on the values firms need to inspire to develop talent from within and the benefits of organic career progression.





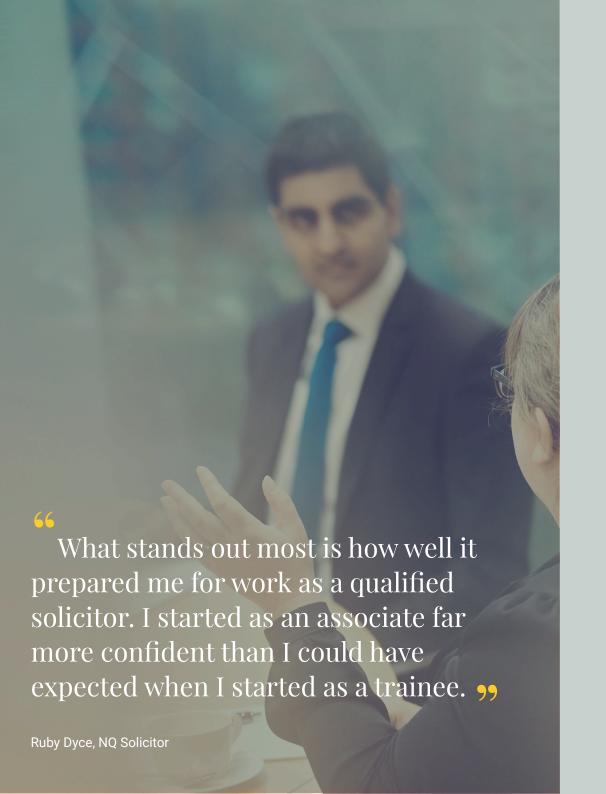


What kind of culture/values does a firm need to inspire loyalty and develop partners who originally trained at the firm?

There are various ways in which a firm may inspire loyalty:

- A supportive atmosphere where one is encouraged not only to learn, but to question. It is far better for junior lawyers to ask questions - even if they sound obvious - rather than to make mistakes which could have been nipped in the bud. This supportive environment should also extend beyond simply the technical legal questions but also to the often equally difficult challenges that life can present to individuals (which may not be work related but in respect of which people may need support from their employer from time to time).
- Promoting relationships between employees. People are not just loval to the firm itself, but to those within the firm. Friendships at work should be promoted as they help to ensure a more harmonious and enjoyable atmosphere in the office. Similarly, if employees can see themselves advancing with those they know, they are more likely to be loyal to the firm.
- Clear path of career progression. Both for those just starting and those firmly ensconced in their legal career, it is important to have visibility as to what the future may hold should they remain at their firm. If people feel that they have plateaued they may start to look for opportunities elsewhere.
- Role models. If the firm has a history of supporting and promoting people who trained at the firm, it encourages others.
- Flexibility with regard to employee's working arrangements. As parents, this is naturally important to all of us, particularly in these unprecedented times.





What are the advantages of progressing your career organically in one firm, as opposed to hopping between firms on the way up the career ladder?

- People: training in four separate departments within the firm before qualifying into one area means that on qualification, and as your career progresses to partnership, you tend to know a lot of people around the firm.
  It is a pleasure being surrounded by both support staff and fee earners who know you well and it provides an incredibly supportive and friendly environment to work in.
- Goodwill: the fact that people know you well and have probably worked with you at some stage during your time at the firm means that you (hopefully!) have earned people's respect. Moving to a new firm requires you to start that process from scratch, which of course is not impossible, but it can take time to build relationships.
- Support: this follows on from goodwill. Working with people you have known throughout your career is a very supportive environment in which to challenge yourself and grow. It is easy to identify who can help you along the way.
- Benefit to clients: Boodle Hatfield is a full-service law firm for private individuals and having worked there for so long, you gain a core understanding of each and every part of 'the machine'. If a client has a niche query about something unrelated to your area of law, the chances are that you will know exactly the right person to put them in touch with. Similarly, having gained the respect and support of colleagues, clients are often referred to us from other areas of the firm.

What advice do you have for future trainees and students on how to identify and pursue career development opportunities at junior levels?

- Think about what you can bring to the table that would add value. Most firms are delighted to hear about new ideas from fee earners of all levels, however junior.
- Have regular conversations with fee earners in areas that you are interested in, ask if you can attend events and show enthusiasm.
- There is no harm in speaking to more senior members of your team (it doesn't necessarily have to be partners) about your ambitions and goals.
- **Get involved in firm and team activities early on**. Join in with business development. It is never too early to start to build your own network.

### How to apply.



#### The selection process

The selection process for 2025 Training Contracts will be held during July/August 2023. Shortlisted candidates will be invited to attend two Zoom interviews, one with our HR Director and another with one of our Partners. Candidates who are successful at this stage will attend an assessment day which involves a visit to the London office, including interviews with Partners'as well as a verbal reasoning assessment.

We want our applicants to feel comfortable during the day so you will also have the opportunity to take a tour of our London office and meet some of our current Trainees over an informal coffee break.

At this stage, we have already seen something about you in your application form that has made you stand out. At the interview we are interested in finding out more about you, your interests, and how you would engage with our staff and clients. You should use this as an opportunity to do the same.

#### The entry requirements

We welcome applicants from all disciplines and Universities. The earliest you can make an application is your penultimate year of your law degree or your final year of your degree for non-law students. Candidates who apply later than this will be considered but should include in their application the reason that they have applied at a later stage.

Successful candidates will have been predicted or awarded a minimum of a 2:1 at University in a law or non-law degree.

### Support & development.

You will have a thorough induction during the first few days after you join us. This will introduce you to different departments and the work they do and equip you with the knowledge to feel confident on your first day with your first department. This induction will continue over your first few weeks and further mini inductions will be arranged for you after each seat change.

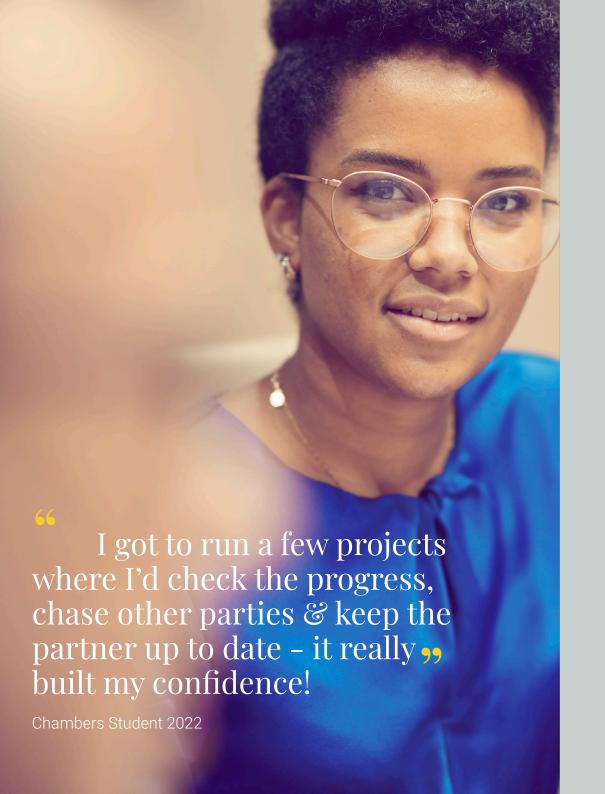
From the moment you join your first department you will be working with friendly and approachable partners, associates and senior solicitors who are very used to ensuring you understand what you have been asked to do and providing positive and helpful guidance on the job.

Our trainees have both a primary and secondary supervisor, maximising the amount of face to face time they can have with a supervisor.

As one of our Trainees you can expect to share an office with your supervisor or another senior member of the department, enabling easy access to ask questions and receive feedback, as well as expose you to what the role looks like at partner/senior associate level.

We encourage everyone in the department to share opportunities for trainee learning and where appropriate to invite a trainee to join them in relevant calls/meetings or task. Trainees are equally encouraged to seek opportunities within the department too.

As a trainee you have formal appraisals every three months, which are designed as a two way process. These meetings give you the chance to discuss your progress and to indicate where more can be done to help with your training and development.



In addition, the Firm's Training Principal and HR Department are always available to discuss training matters and any other issues that may arise.

From day one, you are matched with a 'buddy' from the year above who can help guide through any areas of which you are unsure and help you to settle in.

During your training contract, you are required to attend and successfully complete the Professional Skills Course (PSC). We supplement this with further in-house and external trainer-led training.

Much of your training will happen "on the job", which means that you will gain knowledge and practical experience working with real clients. This is supplemented by support and guidance from our experienced solicitors. As a Trainee with us, you will develop a range of skills and be exposed to a variety of specialisms enabling you to make an informed choice about the area of law you would like to build your career in.

## Salary & benefits.

If you accept a Training Contract with us, we will sponsor you through your PGDL and SQE preparation courses and exams/LPC with BPP and provide you with a maintenance grant of £6,000 per annum whilst you study for these. We do not sponsor students retrospectively.

We offer a competitive salary which is reviewed annually and a generous benefits package. As at September 2022 Trainees receive a salary of £40,000 in their first year, £43,000 in their second year and our newly qualified Associates receive a salary of £78,000. Maintenance grants and salaries are reviewed annually to ensure they remain in line with our competitors.

We offer a comprehensive benefits package including 25 days holiday, private medical insurance, qualification leave and travel to work loans such as a season ticket and cycle to work. For a full list of the benefits we offer please look on our website.

### ESG.

Community involvement is extremely important to us at Boodle Hatfield. We recognise our accountability to all clients, staff, the community and environment. We try to make a difference in the way we conduct our business and support initiatives which contribute to the community and to charitable causes.

Over the last year we have continued to participate in school workshops and employability fairs for students at secondary schools in Southwark. Each year we nominate a charity partner to be the recipient of our fundraising activities. Each year the charity that we support is put forward by and voted in by our staff.

Our fundraising activities over recent years have ranged from the fiercely contested 'Boodle's got Talent' and Boodle Baker competitions to quiz nights, physical challenges such as the three peaks and sky diving, Partner dress up and Boodles very own 'Strictly' dance show. Our Charity Committee works hard throughout the year to arrange fundraising events we can all enjoy.



### Diversity.

Boodle Hatfield is fully committed to creating a working environment in which all people can excel. The firm has a strong inclusive culture of advancement by merit, a supportive culture and senior figures acting as role models offering guidance and championing matters.

We accommodate the needs of our staff, including flexible working policies to support parents, carers and a healthy work-life balance. The firm is led Andrea Zavos. Andrea is the firm's second female Senior Partner, having succeeded the role in May 2023, from Sara Maccallum, who was first appointed into the Senior Partner role at a time when less than 20% of females in the UK's Top 20 Law Firms were promoted to partnership.

Recruiting the right people is important and we benefit from the different perspectives and experiences that our staff bring. We do not recruit to fill quotas and so are proud that progression is based on the individual's merits alone.

We recognise the changing candidate environment and are dedicated to helping staff achieve career aims and support a number of staff undertaking professional qualifications.

Community is important to us. We work with local schools to raise awareness of the opportunities in the legal profession for school students from disadvantaged backgrounds, enabling them to make more informed choices when they come to leave school.

Boodle Hatfield is an equal opportunities employer.

## Wellbeing.



The physical and mental wellbeing of our staff is of the highest priority to us. The firm understands we must support our staff to help improve and maintain their health and wellbeing both inside and outside of work.

We have a Wellbeing programme introducing initiatives to support our employee's wellbeing with particular focus on four areas: Mental Health, Physical Health, Financial Health and Social Wellbeing. As part of our wellbeing activities, we invite guest speakers in to discuss key topics in areas such as nutrition, stress and anxiety, sleep, digital detoxing and financial planning. We also have a quarterly wellbeing newsletter sharing topical information, upcoming events and nutritious lunch recipes.

We host firmwide coffee mornings on a monthly bases and encourage staff to come together for 'elevenses' and have a conversation about mental health and wellbeing.

The firm also has a mental health first aider.

# A message from our Graduate Recruiter.

Choosing a career in law and deciding where you want to train is such an important decision. We hope that the information available to you has helped you decide if Boodle Hatfield is the right fit for you.

We want our people to have fulfilling, long term careers with us in an area of the law that they are passionate about. We look for Trainees and staff who are as excited as us about our client base and by the exceptional quality work we produce for them. We do this in a friendly and supportive environment.

If you still have questions, please do not hesitate to contact me.

### **Jenny Sanghera**

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