

Practice Areas

Overview
Charities
Insolvency
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Tax

Trusts

Wills and Estates

Mediation and
Arbitration
International

Josh Lewison

| Call 2005

Profile: Trusts

Experience and Expertise

Josh has a broad experience of contentious trusts work. He has defended trustees in claims for breach of trust and has acted for beneficiaries in similar claims. He has advised on and conducted Beddoe applications and applications for disclosure of trust documents.

Josh has considerable experience of drafting trusts, including will trusts. He has provided advice and representation in applications under the Variation of Trusts Act 1958 and in claims to remove trustees. Josh also advises trustees in relation to their duties in administering trusts, particularly discretionary trusts.

Josh has been involved in the consultations leading up to the introduction of the PSC Register. He has delivered a number of seminars and talks to the Chancery Bar Association, STEP and individual law firms. He has recent experience of advising in relation to keeping individuals with significant influence and control off the PSC Register as well as in relation to identifying individuals who need to be registered. Other highlights have included:

- Advising a Guernsey trustee as to how to respond to a PSC Register notice from a company at the bottom of the corporate structure held on the terms of the trust.
- Advising Jersey trustees of two substantial related trusts as to the status of the protector of the trusts and the enforcer of the purpose trusts on which the shares in the PTC trustees are held.
- Advising the Swiss PTC of a very substantial Bermuda trust as to the status of various individuals concerned in the administration of the trusts, including the protector.

He has experience of offshore trusts work, particularly from Jersey. Josh was seconded to Ogier in October 2016 where he worked on a number of non-contentious trust projects. These included an exercise to harmonise the terms of a series of family trusts, designing a structure to hold high risk assets and establishing a charitable Jersey foundation.

Josh has recently completed a secondment to a well-known Jersey firm of advocates to assist in long-running litigation. He is also a registered practitioner with the DIFC Courts.