

Profile: Charities

Experience and Expertise

Oliver is regularly instructed by charities and asked to advise on charity related issues, including:

- Challenges to wills and charitable legacies;
- The construction of charitable legacies;
- The tax implications of charitable gifts;
- The use, investment and disposition of charitable assets;
- The administration of charitable trusts, including the exercise of trustee powers;
- Regulation by the Charity Commission; and
- Cy-Pres schemes.

Cases and Work of Note

- *Re Frisbee Deceased*. Acting for three charities in relation to a challenge to the validity of a will;
- *Re B Deceased*. Advised on the IHT position of a gift to a cricket club and whether it was a charitable legacy;
- *Re W Deceased*. Advised on whether a gift to a church was charitable, and if so the use and purpose for which the legacy could be used;
- *Bar Nursery for Lincoln's Inn*. Instructed (with leading Counsel) to advise the Inn on whether the proposed contributions and commitment towards a bar nursery were compatible with its charitable status;
- *Re C Deceased*. Advised on the construction of a charitable legacy;
- *Re S*. Advised on the proposed disposition of charitable assets by way of mortgage and application to the Charity Commission for approval;
- *Re S WT*. Advised as to whether a gift to an Israeli hospital was charitable for IHT purposes.