

"Rising star" Katie Baxter named one of UK's top 40 under 40 private client practitioners

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"Rising star" and Citywealth Future Leaders Lawyer of the Year, private wealth senior associate Katie Baxter has been named a leading private client practitioner.

Katie has been featured in Citywealth's Top 40 Recommended Under 40, a list highlighting the "need to know" people in the wealth management and private client industries. Katie has previously been featured in eprivateclient's UK and Channel Islands Top 35 Under 35 lists.

Josephine Howe, head of Ogier's Private Wealth team in Jersey, said: "This is fantastic and well-deserved recognition for Katie as she continues to play a key role in our Jersey team. Katie's diligent and commercial approach is highly valued by both clients and colleagues alike."

In this Q&A, Katie shares some insights into her role and more.

What type of work have you done in the last year?

The pandemic provided individuals with the chance to reflect and as such has acted as a catalyst with many now focusing on restructuring and future-proofing.

Even as the pandemic edges further away, it continues to set people's minds to streamlining their structures to improve efficiency and simplify matters by having less layering through debt financing, holding companies in various jurisdictions etc. Over the past year, we have had more clients looking to restructure how they hold their assets.

We have also seen an increased demand for "future proofing" as clients consider how they will provide for their family in the years to come and set up new structures accordingly. An issue that has come to the fore over the past two years and continues to be at the forefront is advising on capacity – both physical and mental – in the context of trustees being able to accept instructions from their clients. This is a very interesting and complex area. Most trust deeds have varying definitions of what constitutes incapacity and so each piece of advice has to be carefully

considered and bespoke to that particular matter.

In addition, I have been working on a number of new employee benefit structures. Following the pandemic, businesses want to award their employees for their service and dedication and we have seen numerous firms looking to establish Employee Benefit Trusts, share warehousing structures, or Joint Ownership Plans as a way of expressing their gratitude.

Over the past year, my own practice has also expanded into advising Jersey companies on investment in the overseas cannabis industry. Jersey recently changed its legislation in this regard and following this, I have seen a real demand for advice on what is a very lucrative investment area.

What type of clients do you work with?

On a day to day basis, I predominantly work with trust companies at both local and international levels. This work is incredibly varied as it covers "pure" trust as well as charitable trusts, employee benefits and pensions, and more.

Further to this, I also advise individual settlors, beneficiaries, and protectors, and occasionally work alongside foreign counsel to assist with questions on Jersey's trust law.

ESG: what changes has Ogier made for clients?

Ogier became the first offshore law firm to establish a dedicated Sustainable Investing and Impact Funds practice and it also launched Sustainable Investment Consulting, led by experienced tenured sustainability professionals as opposed to lawyers.

One of the challenges for law firms is the knowledge gap on sustainability advising – lawyers now need to be in a position to identify and advise on issues relating to ESG. We've focused heavily on delivering ESG training and knowhow to lawyers because we've seen how beneficial it is to clients when our lawyers are not just technical specialists but also knowledgeable in sustainable investing and finance.

Clients that are committed to ESG also want to know that the partnerships they form are not in themselves an ESG risk. With our dedicated global Head of Sustainability, Ogier has developed an internal sustainability policy which we are working through as part of our own commitment to sustainability.

Hobbies, philanthropy, personal life ... Tell us more about you as a person.

I have two small children, aged three and six, and so they are my primary focus. But I do enjoy attending my weekly reformer pilates class and, when the weather warms up, I often go paddle boarding around the coast of Jersey (sometimes with the kids in tow). Beach BBQs are also a great way to pass the summer evenings with friends and family. And as a challenge for this year,

I have just signed up for my first half marathon which takes place in October so, training for that will certainly keep me busy.

I am also proud to volunteer for Every Child Our Future (ECOF) through Ogier's CSR and volunteer scheme. ECOF is an education charity in the Channel Islands that helps young children improve their literacy and numeracy skills. Their aim is to help children get the best possible education, no matter their circumstances, by partnering with schools, teachers, parents, businesses, the wider community, and government to provide support in the early years of education.

As a volunteer, I regularly go into a local school and listen to a small group of children as they practice their reading, providing valuable one to one support for each child. Having a child in primary school, I know how fundamental these skills are at a young age and it is great to be able to support other young children in their literacy journey especially when, for various reasons, they might not have that support at home.

About Ogier

Ogier is a professional services firm with the knowledge and expertise to handle the most demanding and complex transactions and provide expert, efficient and cost-effective services to all our clients. We regularly win awards for the quality of our client service, our work and our people.

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