



Julia Beer

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"A formidable advocate with an excellent grasp of the law".

Chambers and Partners

Julia TEP has a Chancery commercial practice with particular expertise in disputes extending to multi jurisdictional estates with underlying corporate vehicles. She is regularly instructed in breaches of fiduciary duties by trustees, personal representatives, directors and partners often with high net worth family members acting in multiple capacities (trustee, director, beneficiary and shareholder). An expert on tracing assets and understanding complex trust and shareholding structures.

As contributor and author of the Unfair Prejudice Chapter in the leading text *Gore Browne on Companies* for over 10 years Julia has a depth of knowledge of Section 994 petitions and regularly advises on shareholder disputes within the high net worth private client sphere.

Julia has been ranked in Chambers High Net Worth rankings since 2022 reflecting the complex high value work she undertakes. She is the “go to” counsel for complex contentious probate issues often involving cross border estates with assets held in offshore companies.

She regularly appears in the High Court on contentious issues in the administration of estates and trusts; claims by beneficiaries asserting breaches of fiduciary duty or proprietary claims including estoppel; constructive and resulting trusts.

She has a particular interest in advising on and extracting value in assets held in high value Farming partnerships and limited companies including upon the death of a shareholder or dissolution of partnership. She regularly advises and litigates high net worth family proprietary estoppel and unjust enrichment claims – often being instructed to advise on resettlements of farming assets.

She is a member of STEP, ConTrA, ChBA and FLBA.

Company and Partnership

Julia is regularly instructed in S994 petitions for both petitioners and respondents typically including dilution of minority shareholdings; misuse of company funds; breaches of SHA; valuation disputes and forensic accounting issues and exclusion from management and challenging defective corporate meetings and invalid resolutions. She is the long standing contributor and author of the Unfair Prejudice Chapter in the leading text *Gore Browne on Companies*. Julia has worked with leading counsel defending extensive allegations of breaches of fiduciary duty against directors in two Cayman Island companies together with multi million pound allegations of breach of contract; fraud and conspiracy. She has considerable expertise in establishing and litigating breaches of fiduciary duty and quantifying the loss arising, recently leading an offshore workshop on *Stevens v Hotel Portfolio IIUK Ltd* [2025] UKSC 28. Julia is often instructed where corporate issues coincide with family breakdowns or succession issues and will advise on shares held within dynastic trusts, where family members are acting in multiple capacities (trustee, director, beneficiary, shareholder).

***Brotherton v Maybrook Properties Ltd & others* [2025]**

Defending S994 petition alleging unfair prejudice in complex commercial property investment company. Allegations of breach of shareholders agreement and directors duties and failure to conduct company's affairs in accordance with the SHA and prejudicial conduct adversely affecting the value of shares held personally and within trust structures.

***AB v MPL & others* [2024]**

Defending a claim by beneficiary of trust and a personal shareholder in high value shareholder and trust dispute. Breaches of fiduciary duty alleged against family members who held dual positions of Trustees over dynastic trusts and directors of parent and subsidiary companies.

***C v M [confidential]* [2024]**

Confidential complex settlement negotiated in shareholder dispute across two corporate vehicles holding high value development land. Allegations of breach of directors duties and whether proper notice had been given in accordance with the company articles for the constitution of a significant company meeting and subsequent voting procedures which were followed.

***Sagicor General Insurance (Cayman) Ltd -v- Crawford Adjusters Ltd* [2008] CILR 19 & 482**

Led by Michael Todd KC in Cayman Grand Court defending multi-million pound claims of breaches of fiduciary duty, fraud and conspiracy in Cayman Islands companies. Pleading Counterclaim for tort of Malicious prosecution for civil proceedings which had eventual success in the Privy Council [2013] UKPC 17 NB did not represent client in PC hearing because of funding difficulties.

Family – Financial Remedy Proceedings

Julia also has considerable experience acting for companies, trustees and creditors in the Family Division in Financial Remedy proceedings. She frequently advises directors and shareholders of family businesses caught up in and intervening in matrimonial proceedings, typically on share division, income and voting rights; minority shareholdings and ownership of assets. She appears regularly in the Family Division and is comfortable with the procedure and FPR and is a member of FLBA. Julia is able to give and advocate a chancery analysis to any non – matrimonial asset in danger of being swept into a global pot. She has experience of dealing with farming partnerships and assets; third party minority shareholdings in family companies; advising trustees whether or not to submit to jurisdiction; championing the rights of the company and its creditors.

***Weisz v Weisz* [2019] EWHC 3101 (Fam)**

Leading case on interim payments in a IPFDA 1975 Act claim.

***K v A & Ors* [2014] EWHC Fam Charles J (Enforcement)**

***K v A & Ors* [2011] EWHC 1639 (Fam) Charles J**

***K v A & Ors* [2012] EWHC 788 (Fam) – Charles J**

Acting unusually for the wife in a case with 7 interveners including the Official Receiver. Issues arising over the beneficial ownership of shares in one trading and two property holding companies; the dilution of the wife's minority shareholding; breach of the director's fiduciary

duties; and freezing the companies' assets.

***F v F & Ors* [2011] EWHC (Fam) – Mostyn J**

Representing parent and subsidiary companies as intervener. Complex inter-company loan structures. Successfully defending the companies' assets from allegations of sham and the wife's claims that the companies' assets were 'property' to which H was entitled to within the meaning of S24(1)(a) MCA 1973.

Professional Negligence

Julia frequently deals with issues of professional liability which arise after the death of the Deceased including: ***White v Jones*** issues and the duty owed to beneficiaries; failure by solicitors to execute a will expeditiously in circumstances when the Deceased is terminally ill; Failure to execute a will in contemplation of marriage. She also has a wealth of experience advising on loss incurred when the Golden Rule is not followed in the preparation of wills subject to a later challenge of invalidity on grounds of incapacity and failure to meet the ***Banks v Goodfellow*** test. Julia has acted for trustees who have relied upon negligent professional advice causing the trustees and therefore the trust to incur significant and unnecessary financial obligation and invest in overvalued property. She is experienced identifying actual loss: For example, the loss caused by solicitors applying for decree absolute thereby removing a widow's pension entitlement prior to a pension sharing order taking effect – and the consequences of mitigation of financial provision through a 1975 Act claim.

Real Property

Julia frequently advises on establishing implied trusts and proprietary estoppel particularly in claims arising against Real Property based upon promises, understanding and agreements during the Deceased's lifetime. Claims arising in respect of real Property held by Company and trust structures.

***Yoshita Gill v Sharad Patel* [2025]**

Complex claim on behalf of the Estate with Defendant counter claiming and his Trustee in bankruptcy being joined to claim. Defendant dying during currency of claim and it being concluded by personal representative and trustee in bankruptcy. Considerations as to the impact of the counterclaim on bankruptcy.

K v K

Complex proprietary estoppel claim against (i) an Estate and (ii) P defending by way of her Attorneys. Claims against farming partnership assets. Cross border and jurisdictional issues.

P v W & P Ltd [2013] (Fam) – Coleridge J

Representing Defendants in claims made over beneficial interest in shareholding of family company and the quasi family home under TOLATA 1996 arising out of a rectification argument. Issues included advising the company on share buy-back settlement proposals and tax consequences.

Liddle v Cree [2011] EWHC 3294 (Ch) – Briggs J

Claim to set aside the division of a farm and various land parcels following breakdown of farming partnership. Advancing claim of undue influence and abuse of the relationship of trust and confidence during the relationship. Satellite issues arising from the winding up of the farming partnership.

Trusts, Probate & Estates

Julia is frequently instructed in connection with multi-million pound estates and trusts. She regularly advises and represents clients in the High Court on cross border succession issues, particularly domicile. In 2017 she was called to the Bar in Northern Ireland to advise on domicile and jurisdiction. She has a specialist interest in advising/seeking vesting orders from the English court for property inherited by minors overseas pursuant to s. 53 Trustee Act 1925. She regularly advises on breach of trust issues; fraud on a power; executor and administrator removal and is very familiar with applications under the Variation of Trusts Act 1958. Julia has a depth of experience in structuring post death deeds of variation both in settlement to litigation and for tax purposes. Julia is co-author of 5th edition of Rossdale Probate and Administration of Estates and a member of STEP Central London.

As to Court of Protection work, Julia regularly advises on issues arising with P's Property and Affairs. She has experience of enforcing security bonds against Deputies; the appointment, removal and control of Deputies. Julia frequently advises on the procedure for Attorneys and/or Deputies to engage in to be authorised to conduct litigation on behalf of P. Statutory wills and the attorney and deputy liability for gifts/monies received and applications for approval. Her expertise in this field is recognized by the fact that she has been an editor of the Court of Protection Law Reports for Property and Affairs since 2016.

Julia has extensive experience of statutory wills being used in circumstances where a legacy in an existing will has been adeemed usually by the sale of a property to meet care home fees. As an adjunct Julia is often engaged by parties seeking expertise in what amounts to preservation of property under Schedule 2 MCA 2005 of an adeemed gift after the death of P. And chancery Division proceedings after P's death pursuing loss on behalf of the Estate because of the Deputy's conduct – typically self dealing or sale at an undervalue. Julia also has experience of advising on statutory wills for conservative estate planning/ tax purposes in the best interests of P.

***Liping Liu v Archbishop Anba Angaelos & Rania Tadros* [2025]**

Defending proprietary estoppel claim on behalf of Deceased's English Estate in cross border Estate.

***Richefond v Dillon* [2023] EWHC 2796 Ch**

Probate claim issued by Executors for grant in solemn form. Defended on grounds of want of knowledge and approval including allegations he was illiterate. Partial approval found. Costs judgment of note.

***Naeema Spaul v Wahab & Others* [2022]**

Successful claim by widow to set aside inter-vivos trust settled by the Deceased purporting to settle personal and corporate property on trust with a value of circa 15 million. Successfully challenging constitution of trust & validity of trust documents. Complex estate extending to multiple corporate vehicles holding properties partially liquidated by receivers.

[The British University in Dubai v Ebrahimi](#) [2021] EWHC 757 (Ch) (26 March 2021)

Representing the British University in Dubai (BUD) in a successful claim to revoke a Grant of Probate and to pronounce against the validity of an alleged Will on grounds of Fraud and failure to comply with S9 Wills Act 1837. Holographic will and validity of attestation. Secondary trial on Will executed and compliance issues with S1 Wills Act 1963.

***Proles v Kohli* [2021] EWHC 470 Fam**

Representing the Deceased's child in the Final Hearing of longstanding 1975 Act claim to determine liability and quantum. Successfully obtained a full order for 50% of needs sought Indemnity costs order given.

[Kohli v Proles](#) [2019] EWHC 193 (Ch) (06 February 2019)

[Proles v Kohli](#) [2018] EWHC 767 (Ch) (17 April 2018)

Preliminary issue of domicile determined in Chancery Division successfully in favour of client after 4 day trial.

***Vucicevic and another v Aleksic and others* [2017] EWHC 2335 (Ch)**

Successfully upholding the validity of a handwritten poorly drafted holographic Will in a £2.7 million Estate; representing the named principal charitable beneficiary the Serbian Orthodox Church. Issues: i) whether the testator intended to benefit the UK registered charity or the Montenegro branch of the Church. Tax considerations arising: ii) whether there was an intention to make an absolute gift or hold on trust and if so for what purpose. Construction arguments considering the use of precatory language and the use of external sources aiding the search for intention notably legal Serbian Opinion on the use of the English word “money”.

***Kneel v Kneel* [2017] EWHC Master Clark**

Successfully removing a co-executor pursuant to S50 Administration of Justice Act 1985 Coexecutor refusing to cooperate in sale of Deceased's home which she remained in occupation of; wind up the Estate; or correspond with the Estate's solicitors such that co-executor could not comply with duties under S25 AEA 1925. 'Welfare of the beneficiaries' test made out. Satellite litigation to obtain occupation of the property.

***V v V* [2017] EWHC (Confidential) (Mr Daniel Alexander QC)**

Confidential settlement after adjourned trial of 3 separate but inter related claims of family members and associated companies. Representing the class of unborn and remoter issue discretionary objects in a will trust. Satisfying the court that the variation was in the interests of the represented class in circumstances where unusually the entire original trust property of circa £7 million (shareholding in a family business) was being substituted.

Notable Cases

***Richefond v Dillon* [2023] EWHC 2796 Ch**

Probate claim issued by Executors for grant in solemn form. Defended on grounds of want of knowledge and approval including allegations he was illiterate. Partial approval found. Costs judgment of note.

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[The British University in Dubai v Ebrahimi \[2021\] EWHC 757 \(Ch\) \(26 March 2021\)](#)

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[Proles v Kohli Deceased \[2018\] EWHC – Judgment awaited](#)

Seeking to establish as a preliminary issue in a 5 day trial that the Deceased had acquired the UK as his Domicile of Choice at the date of death. Representing the Deceased's 4 year old child wishing to bring a claim for reasonable financial provision against his Estate under the 1975 Act. Resisting further late argument that the Deceased had (even if established) legally abandoned any Domicile of Choice. £2.5 million international Estate with complex financial and corporate structuring. Opposing factual matrix presented by Indian family and wife on behalf of Estate. Asserting extensive English financial footprint; intention and residence.

[Kneel v Kneel \[2017\] EWHC Master Clark](#)

Successfully removing a co-executor pursuant to S50 Administration of Justice Act 1985 Co-executor refusing to cooperate in sale of Deceased's home which she remained in occupation of; wind up the Estate; or correspond with the Estate's solicitors such that co-executor could not comply with duties under S25 AEA 1925. 'Welfare of the beneficiaries' test made out. Satellite litigation to obtain occupation of the property

***V v V* [2017] EWHC (Confidential) Mr D Alexander QC sitting as Deputy High Court Judge**

Confidential settlement after adjourned trial of 3 separate but inter related claims of family members and associated companies. Representing the class of unborn and remoter issue discretionary objects in a will trust. Satisfying the court that the variation was in the interests of the represented class in circumstances where unusually the entire original trust property of circa £7 million (shareholding in a family business) was being substituted.

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Recommendations

Chambers and Partners 2026 Bar Guide:

- *“Her advocacy skills are impeccable”*
- *“Reliable, incisive and excellent”*
- *“Clients absolutely love her”*