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The Law of Succession

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The Law of Succession

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Preface

I have followed the general approach of the previous editions of this book in attempting to present as a chronological sequence and logical unity the various elements which are commonly thought of as constituting the law of succession. The law of wills and of intestacy has generally been considered as part of the law of property. Probate law has usually been regarded as an independent topic of little academic import. And administration of estates is frequently presented as part of equity. Yet these elements combine to form a unity, which is a striking amalgam of the various sources of English law. The law and practice of the church courts, common law and equity, as well as statute law and the more recent discipline of taxation are here joined together, but with their separate origins and influences still apparent.

I have attempted to deal with the whole of this field in a length which admits of discussion without making the book too bulky. In doing so I have tried not only to explain the law, but to show how sometimes the likely result can be avoided when the interests of the client so require, for a good lawyer is not one who can merely understand and interpret the law, but one who is able to use the law in the best interests of his client. For this reason I have presented the law not just as a series of rather dead propositions, but have illustrated its significance in overall wealth planning.

This branch of the law has seen a number of changes in legislation since the previous edition was prepared. The most important of these has been the enactment of the Supreme Court Act 1981 with regard to probate, but more particularly the amendments which have been made to the Wills Act 1837 by the Administration of Justice Act 1982. Further changes have been made by the Forfeiture Act 1982, and the Family Provision (Intestate Succession) Order 1981.

There have also been significant developments in case law. As well as dealing with the decisions of the English courts, I have referred to a number of important decisions from courts in the Commonwealth. Indeed, one of the interesting aspects of the law of wills and administration of estates is how particular topics which have not fallen for decision by the courts in England are being developed in the Commonwealth. While all decisions of Commonwealth courts need to be treated with care, not only because they are of only persuasive authority, but also because they may be dependent on their particular local context, they cannot be ignored if an overall view of this subject is to be obtained.

There continues to be difficulty in the selection of material to be included, and I have been faced with two problems in particular. In the first place there is a substantial overlap between the position of personal representatives and that of trustees. As most readers come to the law of trusts before that of succession, I have assumed some knowledge of the law of trusts, and I have therefore felt justified in merely referring on some occasions to the equivalent position of trustees, rather than giving an exhaustive exposition. For the same

reason I have omitted discussion of such topics as the perpetuities and accumulations rules, and the equitable rules as to apportionment.

In the second place, I would very much have liked to have included a section on capital transfer tax, but an account in comparable detail to the rest of the material would have required an increase of about 200 pages in the length of the book.

The manner in which I have dealt with the material is bound to reflect my own experience as a university teacher and a partner in a London firm of solicitors. The result will, I hope, be of interest and use to students reading for degrees, and subsequently while undergoing professional training. I also hope that they will find it worth keeping by them after qualification. By the same token, I should like to think that the book will be of assistance to practitioners, both in the law itself, and in other fields, such as accountancy, where legal problems are never far away. But above all I hope that, whoever the reader, he will find this subject alive and interesting.

The law is stated as at 1 May 1983.

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