

**Minutes of Meeting of the Advisory Board held on
Tuesday 13 June 2023 at 11:00am at 1 The Sanctuary, Westminster**

Present (in person): Michael Heap, (MH) Acting Chair
Christopher Matthews-Maxwell (CMM)
Christopher Vaughan (CV)
Claire Curtis -Thomas (CC-T) (remotely)
Elaine Standish (ES)
Jonathan Coutts (JC)

In attendance: Howard Dellar, Registrar (HJD)
Ian Blaney, Deputy Registrar (IB)
Mili Bhanji, Deputy Chief Clerk (MB)
Jaymisha Tailor, Legal Administrator (JT) (minutes)
Saleef Arif – (SA) Chairman and Co-Founder of Review Solicitors (Item 2 only)

PART 1 – OPEN ISSUES

1. Apologies:

Apologies have been received from Mark Craig (MC), Lesley Hurst (LH), Michael Lightowler (ML) and Neil Turpin (NT)

2. Presentation from Review Solicitors and Questions:

Saleem Arif, Chairman and co-founder of Review Solicitors ([Rate and Review any UK Solicitor with ReviewSolicitors](#)) explained that Review Solicitors are an online platform to enable users to search for a solicitor/firm in particular area of law and to showcase reviews from past /existing clients. The platform allows users to view the firm's accreditation and the option to also view individual solicitors' profiles.

The website has been designed so that it also integrates Google Reviews.

SA demonstrated how to navigate around the website and explained that c.3000 law firms currently use the platform to collect reviews of past clients. Review Solicitors additionally obtains feedback from law firms who have subscribed to the service and allows firms to report of any complaints which may be defamatory to the firm, directly to the account manager/admin and can be immediately removed from the website.

SA reported this is an effective search tool and gives clients a sense of ownership. Analysis has shown that firms that collect reviews get an additional 2/3 clients a week. The website has had over 5 million visitors to date.

Account managers liaise regularly with their clients to ensure they are getting the maximum out of the website.

SA reported that the costs of subscribing to the service vary depending on the size of firm. Generally, the costs vary between £50 to £850 per month.

3. Digital Comparison Tools/ Website – Discussion

The Board agreed that the Review Solicitors platform acts more as a marketing tool and the costs would not particularly appeal to notaries. This item would be reviewed again in two years.

4. Minutes of Last Meeting:

(a) Approval of Minutes – The minutes of the meeting held on 14 March 2023 had been circulated and approved by all present.

(b) Confirmation of Documents uploaded to website – Confirmed

5. Matters arising not otherwise on the Agenda:

(a) LSB Statement of Policy – Ongoing Competence

MB confirmed that NT had submitted the Faculty Offices response to the LSB and is awaiting a substantive response. No further updates.

(b) Disclosure & Barring Service Certificates – amending SI

IB reported that the Debate regarding spent criminal convictions is currently making its way through the House of Lords.

The paper drafted will be shared with Unlock and another body. Unlock is an independent charity which challenges the Governments approach to disclosing old and minor criminal records on standard and enhanced checks issued by the Disclosure and Barring Service (DBS).

IB confirmed he would be happy to share the draft paper amongst the board members once this has been prepared.

6. Faculty Office Updates

(a) Faculty Office Business Plan

(i) Supervisory Provisions for Conveyancing & Probate

IB reported that it is the Master's Priority to assess the state of supervision for new notaries who wish to practice in conveyancing and in wills, probate and administration and to ensure it is at the right level and fit for practice.

IB explained the paper is an open paper and sets out how the current system works and also outlines nine tentative proposals for improving the current regime.

Under the current system

- All notaries must be supervised for a period of two years
- Notaries undertaking Conveyancing and Probate activities must be supervised for three years, under supervision of an experienced supervisor.
- Notary Supervisor tends not to be in the same organization (unlike solicitor supervisors)

IB directed the board to Page 8 of the paper, the possible proposals which could be taken further to enhance supervision for new notaries who undertake conveyancing and/or probate.

The board were strongly in favour of proposals (1) and (8) which suggested day-to-day supervision in these areas by a non-notary practitioner and additionally for the number of inspections to be generally increased.

IB explained that our recommendation could be to undertake a fact-finding exercise to look at this with more evidence, requesting views from the profession, public and stakeholders.

MB reported on conveyancing and probate statistics:

- 25 Notaries undertaking Probate
- 15 Notaries undertaking Conveyancing
- Out of these, 11 Notaries undertaking both Probate and Conveyancing (4 of which are under supervision)

ES commented that the paper did not discuss background checks on newly qualified solicitors. For example, if the notary is a solicitor the risk is far less as they have experience in the field whereas those who have just graduated from university and have not worked in practice before having far less experience.

Supervision periods need to be defined. Meeting every six months for one hour over a period of three years may not be adequate.

IB invited members of the Board who have views on the paper to share them in writing.

(ii) Insurance Minimum Term

Notaries are required to hold professional indemnity insurance and fidelity insurance and to provide evidence of the same on renewal of their annual practicing certificate.

We do not currently have a specific requirement for notaries to hold run-off cover following retirement which potentially leaves both notaries and their clients exposed in the event of claim being brought post-retirement.

IB suggested that a broker could be approached to obtain an idea of costs and put in place a mechanism that if a notary does cease to practice that the cover continues.

7. Law – Tech / AI

Nothing to report – postponed for next meeting.

8. AML/OPBAS Matters:

MB reported that no further update since the last meeting regarding OPBAS. Currently looking at appointing a consultant to conduct a review and deliver specialist in house training and to improve AML framework.

MB requested Money Laundering case studies from members of the Board to add to the website and newsletter (to forward to MB).

9. Any Other Business:

IB reported that a paper on Disciplinary Systems will be circulated to the board for review and consideration, any comments are to be made within 21 days.

10. Date of Next Meeting

Tuesday 5th September 2023 (In person)

AGENDA PART 11 – CLOSED ISSUES

(None to report)