

### **About Clarion**

Clarion was recognised in the Legal Business Awards 2022 as the leading law firm outside of London.

Location, size and reach - Based in the UK, in Leeds, the firm comprises 29 partners, over 170 other lawyers and over 90 support staff. We serve and support businesses, in all their legal needs, throughout the UK and in over 75 countries worldwide. Geography, both within the UK and internationally, simply isn't a constraint and we place emphasis on meeting with our clients and preferred overseas law firms, wherever they are based, to help build and maintain strong relationships.

Our clients - We are trusted across a wide range of industry sectors by a broad range of businesses, from those listed in London or overseas, and UK subsidiaries of companies listed overseas, to solely UK based companies and owner managed businesses. We also act for many entrepreneurs and high net worth individuals. It is a testament to what we provide to our clients that leading UK and international businesses choose to work with us, including Continental AG, VENSYS Energy AG and InterSystems, just to name a few.

Capability - As a full service and large commercial law firm, we can provide our clients and our preferred overseas law firms with advice and support on the English law elements of all transactions, commercial relationships, disputes and regulatory issues.

Preferred overseas law firms - We work across the globe on a non-exclusive basis with carefully selected independent law firms, that we value and trust, based in jurisdictions where our national and international clients have local law needs and who have similar values and capabilities to us. We have chosen not to be part of a formal international alliance, allowing us to select the right firm to work with on any specific job. In doing so, we have regard for that firm's prior knowledge of the client or its business sector, our previous experience of working with the firm, feedback from other firms with which we partner and which we respect, and whether the firm's expertise, location, cost, service levels and culture align with our and our clients' requirements.

We look to build long term strategic relationships

with our preferred overseas law firms, so that we can mutually support and work with each other and each others clients on domestic and cross-border matters across the full scope of our core services.

Where possible we also look to involve our preferred law firms in our business development activities, including client training sessions and sector specific events.

Attractive fee structure - Clarion takes an innovative approach to fees. We seek to establish the needs of our clients and the overseas law firms with which we work, and formulate a bespoke model designed to benefit our clients and reflect the commercial value to our clients of the support we provide.

A model may include a combination of fixed fees, capped fees, hourly fees, volume discounts, third party funding (where appropriate) and performance criteria. Where possible we will seek to align our own fees with those of the overseas law firms with which we work.

Most importantly, our base in Leeds means that we can provide legal advice and support to our clients and also our preferred overseas law firms and their clients, which is typically about half of the cost of similar London based firms. For example, our usual hourly rates range from £450 at partner level to £200 at junior associate level. Given our excellent travel links with London, most of our litigation and arbitration work is conducted in the courts and tribunals in London and many of our corporate and commercial transactions have counterparties and advisers based in London.

Focus on talent - Through both our home-grown lawyers and our recruitment of quality like-minded people from leading national and international firms, we offer clients access to an exceptional array of legal talent and expertise. We continue to invest in our business all the time, recruiting leading talent from the likes of firms such as DLA Piper, Eversheds, Pinsent Masons, Squire Patton Boggs, Allen & Overy, Addleshaw Goddard, Stephenson Harwood, and Clifford Chance, amongst others.

In-house lawyers - Where our clients have an inhouse legal function, whether in the UK or overseas,

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we work closely with the legal team to mirror internal governance processes. We appreciate different in-house teams approach external legal support in different ways and we are always happy to work in the manner that best suits our clients. By ensuring that we meet internal standards for responsiveness and properly understand our clients' in-house legal processes, we are able to give practical advice that leads to swift and successful conclusion of projects.

Ethos - Our ethos is that we deliver on our service promises by providing the highest quality of English law advice to give the best possible experience to the clients we act for directly, or via referrals from overseas law firms. We give our absolute commitment and focus to build long term relationships and ensure that we fulfill all of our commitments. We also look to provide a service which is not just of the highest quality, but is also innovative and driven by the enthusiasm and energy of our highly talented lawyers. This ethos is embodied in our core values.

Investing for the future - Clarion was created in 2007 when an ambitious group of partners undertook a management buyout of a successful UK law firm with the aim of creating a fresh and innovative full-service commercial law firm without the structural, legacy and cost issues that typically constrain many of our competitors. Since starting out we have generated double digit year on year growth, allowing us to invest continually in our people, business and our clients.

Understanding our clients' real issues - We have differentiated ourselves at Clarion by not only being business people, but also being excellent lawyers, understanding our clients' real issues in a commercial context, as well as excelling in serving their legal needs.

Transparency and clarity – Clarion has an open and transparent style that encourages greater collegiate behaviour, with our clients, internally within the firm, and with our preferred overseas law firms. This enables us to provide a seamless and consistently high and focused service, which is relevant to the needs of our clients.

Added value - We have a proven track record of supporting businesses by focusing on upfront investment in our relationship with clients. For us, 'adding value' means working collaboratively to address challenges and leverage opportunities for our clients' businesses. Some successful strategies include developing training programmes to increase the capability and knowledge of our clients' employees and in-house legal teams. Others might include providing real or virtual secondment support for in-house legal teams, sharing standard documentation and also working collaboratively alongside our clients' other chosen law firms outside the UK. We look to provide added value initiatives that are of real benefit to our clients.

Strategic and operational partner input - We are proud to be a partner led law firm, by which we mean that we ensure partner input into all projects and transactions for our clients and our preferred overseas law firms. The insights that senior level involvement brings can reduce costs by identifying solutions based on experience, and can make the difference between a 'good' outcome and a 'great' outcome. Partner involvement in all strategic matters is even more extensive, with more junior lawyers generally putting agreed actions into practice and processing tasks on a matter.



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## International team - your key contacts



Richard Moran Senior Partner Corporate

E: richard.moran@clarionsolicitors.com M: +44 (0) 7825 635211 T: +44 (0) 113 322 3212

"Richard balances intellectual firepower with a warm and open personality that makes him a pleasure to work with." - Chambers UK



David Williams
Partner
Commercial Dispute
Resolution

E: david.williams@clarionsolicitors.com M: +44 (0) 7850 703325 T: +44 (0) 113 227 3602

"David is well versed in a broad range of commercial disputes both nationally and internationally. His areas of notable expertise include litigation related to energy and projects work. He is described by those in the market as "a key player."

- Chambers UK



David Cunningham Partner Commercial & IT

E: david.cunningham@clarionsolicitors.com M: +44 (0) 77789 654457 T: +44 (0) 113 336 3430

"Clients describe David as a delight to work with and very experienced, diligent, insightful and responsive." - Chambers UK



Esther Kirwan
Partner
Intellectual Property

E: <u>esther.kirwan@clarionsolicitors.com</u> M: +44 (0) 7720 433870

T: +44 (0) 113 336 3432

"An exceptionally strong trade mark and IP lawyer. Esther offers expert guidance with respect to brand strategy and enforcement and excellent attention to detail."

- Chambers UK



Dominic Higham
Partner
Commercial Dispute
Resolution

E: dominic.higham@clarionsolicitors.com

M: +44 (0) 7825 879000 T: +44 (0) 113 336 3377

"Magnificent and capable of winning confidence in a very difficult environment - a commercial lawyer in its best and broadest sense."

- Cabinet Office, Executive Director



Christian Hellmund Partner Energy and Projects

E: <u>christian.hellmund@clarionsolicitors.com</u>
M: +44 (0) 7525 822 315
T: +44 (0) 113 733 2494

"Christian was excellent. He devoted full attention to the project and drove forward what was a unique and bespoke requirement." - Legal 500



### Our core business areas

#### Corporate

The team advises companies, institutions, entrepreneurs and owners on a range of corporate issues including corporate governance and business structures, acquisitions and disposals, restructuring and reorganisation. The team acts for owner managed businesses and large national and international corporates as well as private equity investors.

#### **Banking & Finance**

The team advises businesses and lenders on financing growth, funding and security, providing a commercially focussed service. We act for a range of mainstream and secondary lenders. We also act for private debt funds and equity investors as well as borrowers with extensive portfolios of assets who require specific restructuring or refinancing advice.

## Litigation and Arbitration

We handle UK based and international disputes, including those relating to M&A, JVs, shareholders and finance; commercial contracts for outsourcing, supply chains, distribution and logistics, IT, product recalls and quality issues; civil fraud investigations and bribery, professional negligence and property development related disputes. We conduct all forms of dispute resolution, whether pursued through the courts, arbitral proceedings (including ICC and LCIA), or mediation and expert determination, and we act regularly for clients seeking or defending injunctions.

#### **Data and Information**

Data protection (DP) arises both in the context of standalone advice and also as an integral part of many commercial and IT relationships. Clarion's DP advisory practice provides both reactive advice for clients with DP breaches and proactive support for businesses needing to implement or reinforce DP compliance, including full or partial DP compliance audits.

#### **Employment**

Our team provides the full range of legal advice including the preparation of service, apprenticeship, consultancy and secondment agreements and contracts for volunteers. We regularly assist our clients with the day to day issues which arise within any workforce, such as conduct, performance and absence management issues, discrimination complaints, dismissals and grievances. We also act on behalf of our clients to defend Employment Tribunal claims and provide advice in relation projects such as the management of reorganisations and restructures and the application of TUPE.

#### **Commercial Contracts**

The team advises on a wide range of commercial contract issues, from general advice to high value complex deals. The team's work includes contracts relating to supply chains, procurement, logistics, distribution, IT, PR and marketing, research and development, outsourcing, media and telecoms.

#### **Intellectual Property**

Our team offers expertise in relation to the identification, protection, exploitation and enforcement of all IP rights including trade marks, patents, designs, copyright, databases, and confidential information. We frequently advise on protection strategies for newly developed IP, and on IP aspects of collaborative development projects and joint ventures, as well as in the successful resolution of IP disputes. We provide new brand clearance and freedom-to-operate opinions and negotiate agreements for the exploitation of IP including, IP licences and distribution agreements.

We often play a key strategic role in the creation of IP-led joint ventures. Our IP practice includes a trade mark and designs portfolio management service, in respect of which we prosecute and administer portfolios for our clients in over 75 countries worldwide.

## **Business Restructuring** and Insolvency

Offering all aspects of insolvency and corporate recovery support, we advise businesses suffering distress, businesses interested in purchasing distressed companies and also businesses that simply want to recover the maximum cash from an insolvent customer. We also have a strong track record in recovering goods protected by a retention of title. We have strong long-term relationships with fellow professionals, banks, advisors, asset based lenders and private equity providers, giving us access to a wide range of options to assist in any situation.

#### **Real Estate**

The team deals with all aspects of property law including freehold and leasehold acquisitions and disposals, landlord and tenant management work, commercial and residential development and real estate finance transactions across all sectors, with a particular focus in the manufacturing and retail sectors. In the corporate context, we represent clients that own or occupy office, retail, industrial and leisure premises as part of their operational requirements working closely with our clients' asset managers/estate teams and providing strategic advice on acquisitions and disposals, and assisting with the integration of new assets within their portfolios.

#### Regulatory

We are able to support business through internal and external regulatory investigations and help prevent any incidents and breaches from occuring, as well as advising on compliance programmes, corporate policies and procedures, and providing training. If there's a prosecution, we can represent clients through the court process. We have regulatory experience in food safety and standards, product safety and recalls, health and safety at work, environmental, advertising standards, trading standards, veterinary pharmaceuticals, anti-bribery and corruption, fraud and financial irregularities, directors' duties, competition investigations and dawn raids, and money laundering.

#### **Debt Recovery**

Our team deals with all aspects of debt, from assisting with internal credit control procedures and providing a comprehensive pre-legal approach through to bankruptcy and winding up action where necessary. We typically achieve a recovery rate of 85%, which is well above the industry standard. Whilst we offer a pro-active debtor approach to avoid court action, where necessary the team takes immediate and persuasive action to recover debts.

## Energy, Infrastructure and Environment

We help clients to harness energy opportunities from inception to exit, including oil and gas exploration and joint operating agreements, government licences and negotiations, planning & consents, procurement, project financing, real estate, construction, commissioning and operation, distribution networks. metering, regulatory regimes, logistics, government incentive mechanisms, commercial energy & supply chain agreements, power purchase, energy contracting structures (incl. ESCO arrangements) and energy disputes, including UK and international litigation and arbitration. We have a breadth of experience advising on conventional as well as non-conventional energy projects and disputes, in particular upstream oil and gas, low carbon energy infrastructure including generation, all forms of renewables, energy from waste, district heating, decentralised energy and storage solutions, and metering solutions.

# Construction and Projects

The team acts in both contentious and non-contentious matters advising large private and public sector bodies and all parties involved in the construction industry. We provide commercial advice concerning procurement, development agreements, building contracts, including JCT, FIDIC, and PFI contracts, sub-contracts, professional team appointments and collateral warranties. We work closely with our Commercial, Real Estate and Banking teams, providing construction related input into their transactions and documentation.

The team also advises clients in contentious matters representing parties in mediation, adjudication, arbitration and in the Technology and Construction Court. These contentious issues are often complex involving a number of parties in multi-million pound claims across different jurisdictions.

#### **Private Wealth**

With an excellent reputation for advising individuals, our practice includes advising on the most appropriate structure for wills and their preparation, including for clients with business interests, complex family arrangements and cross border aspects. We also advise on the creation, administration and taxation implications of trusts whether it be in a client's lifetime or through their Wills on death. Working closely with our Corporate team, we have particular expertise in helping business owners consider business succession.

"More rounded and commercial advice than you could usually hope for. Really focused on understanding their clients and being innovative in addressing challenges. Great value-added offering" - Legal 500

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## Collaborative opportunities

We work in partnership with our preferred overseas law firms to build long term collaborative relationships of mutual benefit.

Pairing up - We are always keen to "pair-up" members of the Clarion teams, across our key practice areas, with relevant key contacts at our preferred overseas law firms, in areas where there may be opportunities for us to work together and refer work. We place emphasis on face to face meetings, either via video conferencing or in person, as and when we are on visits overseas or when our preferred law firms are visiting the UK.

International events – Our lawyers attend various international events during the year including the likes of INTA and the IBA conferences. These are great opportunities to meet when our preferred overseas law firms also attend these events.

Client events and training - Across the independent overseas law firms with whom we choose to work, we seek to provide support to each other for relevant business development activities, where suitable, such as speaking at, or otherwise participating in, client business development events and also legal training events for in-house counsel and clients. For example,

we routinely hold sector focused events for clients and contacts of Clarion and we like to invite our preferred overseas law firms to attend at any which might be of interest.

We always welcome seminar ideas and enjoy working collaboratively with our preferred overseas law firms on topics of interest to businesses operating and trading internationally.

Corporate introductions – We work with our preferred overseas law firms to identify mutually attractive clients and contacts that we can introduce to each other. For example we can identify organisations based in the UK which are either existing clients of Clarion or who are otherwise known to us, and which have operations or subsidiaries in other countries and we are happy to effect an introduction for any preferred overseas law firms. Hopefully our preferred overseas law firms can do likewise for us for businesses they know which have operations or subsidiaries in the UK or which trade with UK parties.

### Clarion values

We are clear about where we want to be in the legal market and who we want to work with.

We are uniquely placed to service our clients' full business needs as well as protect them personally by offering a full complement of corporate services alongside one of the largest private client teams outside of London.

We invest proportionally more than most law firms in developing our people and culture, to ensure that we create well-rounded people, who are best able to deliver an outstanding client experience. Increasingly, organisations are choosing Clarion because of our people and our culture.

Our people strategy flows from what it means to be Clarion. The service we provide is always rooted in our strong values where we:

Stand in our clients' shoes

Stand together Stand out

