



**We do things a little
differently...**
Our investment in you
and your business.

Clarion

Introducing Clarion

We are a team of experienced, talented, committed people who want to get to know you and where you want to be.

We'll protect you where you need it and help you grow, create and prosper where you can.

We would like to introduce you to Clarion, our people and values and how we work side-by-side with many of the most successful growing and entrepreneurial businesses in the region.

For us, it's all about the relationship. We know that strong partnerships create energy and deliver results. We are a team of experienced, talented and committed people who want to get to know you.

Our model is based on a combination of recruiting talent from international firms and nurturing and developing our own lawyers from paralegal or trainee solicitor through to partner. We do this whilst operating from a single site, allowing us to maintain our commitment to keeping our cost base low.

This means we are able to provide top quality advice on a commercially attractive basis and we already do this for many businesses like your own. We make it a priority to invest our time in getting to know you and your business, and this is just one of the things that differentiates us from other law firms. We want to understand your real issues, rather than just serving your immediate needs. That way, we can provide the insight and expertise your business really needs and understand where we can best add value so we can invest in your success.

We work in partnership with a wide range of owner managed businesses from SMEs to complex businesses with turnovers over £100 million.

We also work with entrepreneurial and emerging talent in early stage businesses. We deliver cutting edge advice to these businesses to assist them in maximising shareholder value. We integrate with the management team to allow your business to receive coherent and consistent legal services.

We deliver on our service promises to give the best possible experience to our clients. Each of our clients has the absolute commitment and focus of our partners to build long-term relationships and ensure that we fulfil all of our commitments to you.

We want to provide you with assurances of our commitment, capability and quality. Needless to say, if you would like any additional information which is not provided, please get in touch with your contact, or Richard, whose details are below.



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Get to know us

The investment that we continually make in our people and our clients is reflected in the high calibre of our lawyers and support teams and the results we achieve. We have had significant organic growth year-on-year for as long as we can remember, and we are very confident about our future growth.

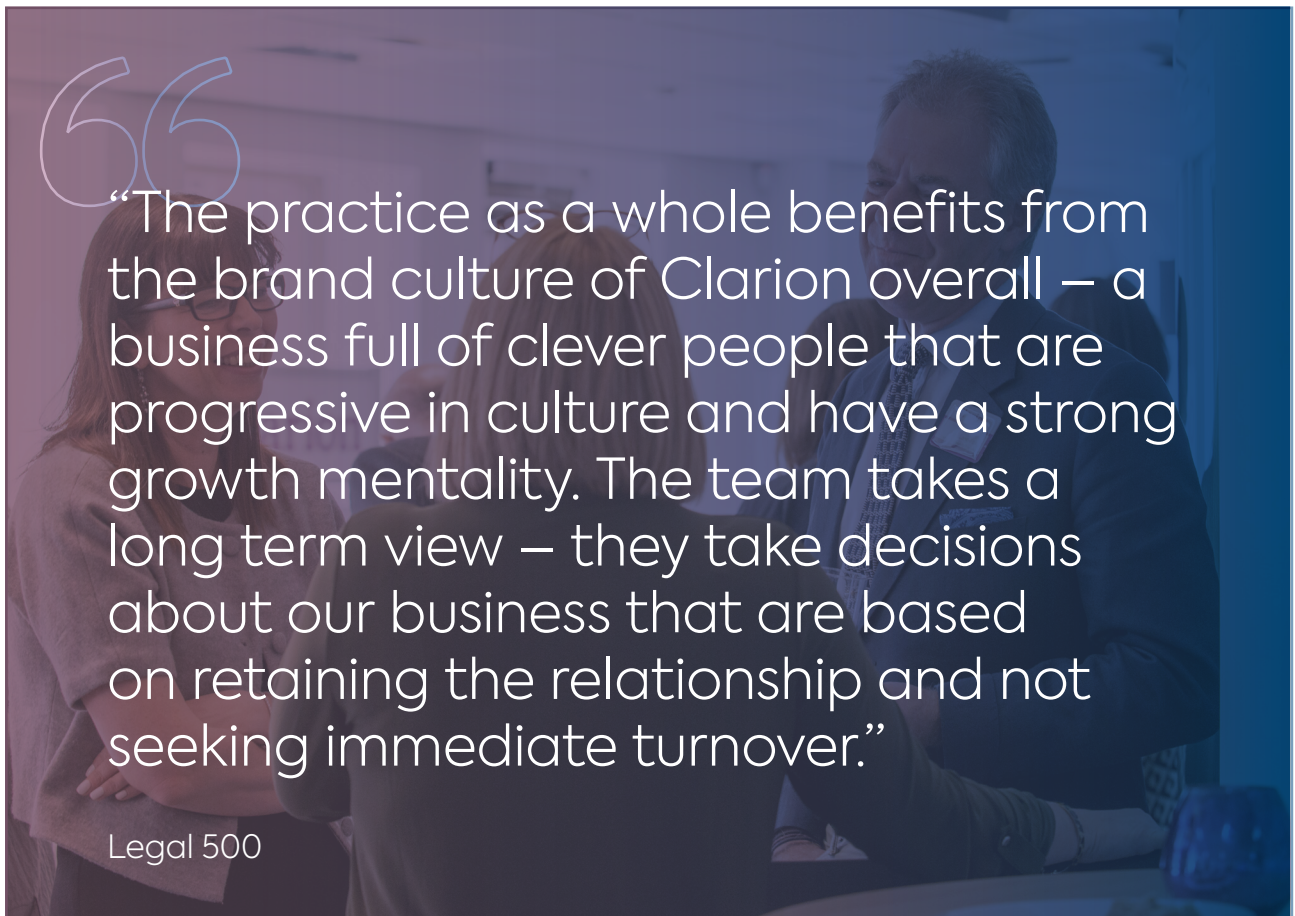
We are clear about where we want to be in the legal market and who we want to work with. Based at a single site in Leeds we work with business owners across the UK and in over 78 countries worldwide.

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 wealth teams in the region.

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.

In 2020 we were ranked No. 8 in the prestigious Sunday Times 'Best Small Companies to Work For' list which recognises the 100 companies throughout the UK with the most engaged teams. Clarion was also the highest ranked law firm in the UK and achieved the highest ranking of any business in Yorkshire that year. Clarion achieved a three star accreditation in the 2020 'Best Companies to Work For' scheme.

In 2022 we have once again received this three star accreditation. We have also been named No. 1 best Large Company to work for in Yorkshire, No.1 law firm in the UK and No.2 Best Large Company to work for in the UK.



“

The practice as a whole benefits from the brand culture of Clarion overall – a business full of clever people that are progressive in culture and have a strong growth mentality. The team takes a long term view – they take decisions about our business that are based on retaining the relationship and not seeking immediate turnover.”

Legal 500

Clarion values

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

Clarion in the community

We believe that every business can, and should, play an active and valuable role in supporting the community in which it works, bringing tangible personal development and other benefits we can all enjoy.

Examples of some of the community projects which we are involved in include the following:

- we have been the headline sponsor of the Leeds Jane Tomlinson 10k Corporate Challenge for over 15 years;
- a number of our lawyers at Clarion share their expertise with students at local high schools and BPP as part of ongoing mentoring programmes;
- we have been recognised by the Leeds Dementia Action Alliance for becoming 'dementia friendly' and are active supporters of Carers Leeds; and
- Clarion is proud to support various charities, which are chosen on an annual basis by the team, and during the current financial year are enjoying supporting the Childrean's Heart Surgery Fund.

Being Clarion means never being ordinary.



We'll protect you where you need
it. And help you grow, create and
prosper where you can.

How we work

Your business needs

We are 'people' people and believe in building long-term relationships with all our clients, getting to know you personally from day one. It is our philosophy that only then can we truly provide the advice and expertise that's relevant to our clients' needs. We want to understand your real issues, rather than just serving your immediate legal needs.

Some of our points of difference include:

- we give our people time to get to know you to ensure a full understanding of your business, the challenges you face and the opportunities you want to take advantage of, allowing us to work in partnership in a proactive manner;
- our people are the reason we can say we're never ordinary. Across Clarion, you'll find personalities who think differently, and teams who complement each other;
- the fact that we are a high-growth entrepreneurial law firm, working with a diverse range of clients that remain loyal due to the relationship we develop with them;
- we want to help you get to where you want to go so

strategy, innovation, growth, resilience, internationalisation are topics that we really want to talk to you about; and

- our focus on genuinely adding value through our entire client service team.

Your personal needs

We have the largest private wealth offering of any commercial practice in Leeds, allowing us to offer integrated corporate and private wealth solutions to our entrepreneurial owner managed businesses.

It is really important that business owners consider their business interests alongside their personal and family protection. Getting to know you and developing an understanding of your future plans will allow us to get the right people involved to ensure all planning is integrated.

We can provide tax planning, business succession and estate planning advice in an innovative and effective way.

International

Based in Leeds, we serve and support businesses all over the United Kingdom and in over 78 countries worldwide. We understand international business and work with partner firms that

we value and trust. 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 matter. So whether you are looking to export for the first time or working with a new overseas supplier, we can ensure you and your business are protected, informed and aware of all your options and obligations overseas.

Strategies to add value to your business

Clarion has a proven track record of supporting businesses, by focusing on upfront investment in our relationship with clients. For us, 'adding value' means working together to address challenges and leverage opportunities for your business. Whether through the direct delivery of our legal services, or through our general approach to making useful connections and encouraging business growth.

Some successful strategies can be found inside the back cover of this document. How we add value is bespoke to each client and throughout our relationship we'll always be looking for new ways of helping you.



We give our people time to get to know you.

Your account

Our approach to relationship management

You will have a dedicated relationship manager who will meet with you on a regular basis to understand your business and your priorities and to review our performance with you. Your relationship manager will commit to investing time in you without any charge.

In addition to your relationship manager, you will have a client team who know your business and will support you.

We follow a straightforward process:

- a single engagement letter that sets out the terms of our relationship with the business. If required and appropriate you will receive a separate letter for your personal matters;
- a short record of instructions every time you ask us to do something new for you, summarising your requirements and providing a fee proposal;
- systems such as online portals may be appropriate to make information more freely available to you or address other business needs;
- agreeing fees with you before invoices are raised;
- in appropriate cases, a dedicated account manager to liaise with your business around day-to-day issues; and
- transparent pricing information.

Fees

As a single-site practice based in Leeds, we have control over our cost base. This means that we are able to provide competitive rates without compromising on quality. Our rates, however, are only a tool to help us value jobs. We recognise that as an owner managed business, cost control in relation to legal fees is important and the input you receive from us must represent 'value'.

Too often the legal sector has been associated with over-engineering solutions and surprising the client with a large bill. Clarion has a clear process of ensuring we understand not only your issue but the causes of the issue to ensure we 'right size' our approach. We take an innovative approach to fees and embrace many different approaches, so clients can be sure they are getting the right service at the right price.

Giving you control

You need to be kept informed and be in control of all matters on which we are working.

By adopting practices that have been common in industry for many years, we provide a straightforward account management process intended to make your life easier by preventing financial surprises and ensuring you feel on top of your legal portfolio.

Our approach makes things simpler for you and gives you the confidence that we will look after all your business matters in one place and deliver your personal work alongside this.

“Clarion has a clear willingness to understand its client’s business, how it works, and what the particular risk areas are. It shows commerciality as to agreeing contracts and getting the job done, rather than dragging a matter out and incurring unnecessary fees; it is very refreshing.”

– Chambers UK

Aligning our services to your needs

Personal strategy

- A sounding board
- Growth through acquisition
- Family succession dynamics
- Directors' duties
- Enhancing shareholder value on exiting
- Shareholder structures

Sales

- Secure deals quickly and effectively with practical contract documents and advice
- Tender advice and negotiation
- High-level analysis of your target markets and potential routes to market

Governance

- Managing relationships with stakeholders
- Helping you make appropriate decisions
- Creating and advising upon policies and procedures

Public procurement

- Demystify public procurement law
- Negotiation support when bidding for public sector work
- Relevant and timely challenges to procurement decisions

Acquisitions and joint venture strategy

- Helping identify acquisition targets and opportunities
- End-to-end transactional lead and support
- Joint ventures for competitive advantages
- Analysis to understand your competitive landscape

Protect your ideas

- Strategies to identify new intellectual property
- Selecting the most cost-effective protection available
- Enforcing your protection to prevent infringement

Valuing your brand

- Your names and logos have value that can be protected
- Monitoring for infringement of your brand online
- Management of global trade mark portfolios

Solution development

- New software, systems or architecture needs effective contracts for successful implementation
- Assistance pre-contract to 'get your business in order'
- Life cycle management, to help you pull contractual levers at the right times

Data integrity

- Developing policies to manage data usage
- Advising on ISO27001 compliance requirements
- Implementing policies addressing data protection changes



Strategy

Growing the business

Winning profitable customers

Business Development Director

New Product and Process Development

IT Systems & Sustainable Processes

Maintaining competitive advantage

Pers Strat

onal
tegy

Finance and banking

- Advising on all banking and finance documentation
- Debt relief proposition
- Advising on alternative financial mechanisms such as invoice discounting and supply chain finance
- Funding for growth
- Debt recovery

Procurement function

- Organising processes to generate value
- Outsourcing of functions to improve service/reduce costs
- Helping manage contract life cycle to prevent intermittent issues becoming major threats to service

Site identification

- Our close connections with a network of surveyors and other property professionals allows us to identify opportunities for you
- Securing deals quickly by decisive straightforward legal intervention at an early/head of terms stage
- Advice on problematic sites - environmental liabilities, restrictive covenants, planning issues and structural defects

Reducing costs and optimising assets

Finance

Property & Logistics

Employment

Legal

People

Reinforcing value in the business

Development and investment

- End-to-end transaction support
- Assisting on funding strategies for investment and development finance
- Advice to structure deals in a tax efficient manner

Employee engagement

- Learning and development
- Reward strategies
- Policies and procedures
- Apprentices
- Immigration
- Private wealth and family advice
- Recruitment for growth

Employee relations


- Regular feedback, training and analysis of issues will reduce dependency upon employment lawyers
- Dedicated helpline staffed by experienced and qualified lawyers
- Insurance-backed tribunal cover further de-risks costs

Managing disputes

- Swift decisive action can result in an immediate result
- Preserving business relationships by selecting the right tactics

Compliance

- Providing tools to enable you to drive a compliance culture
- Business training to cascade key principles to employees
- Engaging with regulators to preserve clients' position and minimise impact



“The communication is extremely good – it’s the right balance to ensure you are aware of the progress. Additionally, when we hit problems, the advice is very commercial. The lawyers take complex issues and distil them into something the general world can understand.”

– Legal 500

Our core business areas

Corporate

We know that there's more to your business than just those big red letter days and we want to support you on your journey to reaching your goals, whatever they may be. Your business may still be in its early stages and figuring out where it's going, it may be dealing with the growing pains of a maturing business or it may be well established and planning for the future. Wherever you are in the life cycle of your business, we're here to provide strategic advice to help you take the next step.

Banking & Finance

Our clients include banks, lenders and debt or investment funds, alongside private equity investors, asset managers, high-net-worth individuals and borrowers. Because we act for a wide range of stakeholders within the banking and financial services sector, we understand the challenges which lenders, investors, borrowers and guarantors face. This enables us to anticipate points which other stakeholders may take in negotiations and to take a suitably pragmatic and commercial approach, putting solutions in place for you quickly.

Commercial Contracts

A business's value is underpinned by the contracts made with its customers and suppliers. Managing your contract portfolio, dedicating resource where needed and coming up with low-cost solutions where possible (for example, general use of terms and conditions), is an essential way for a business to preserve customers and maintain its supply chain. As experts in commercial contracts, we create enforceable and accessible contracts that meet your objectives, whether that be deal-specific terms or more generally aligned to the risk profile and, importantly, ethos of your business.

Information law

Failing to comply with GDPR is one of the most serious risks a business can face. With our help, you can be confident that you have the necessary processes, procedures and documents in place to be compliant. We advise on the initial stage of conducting a data mapping exercise. We analyse the results of a data audit on a risk assessment basis and determine the extent of GDPR compliance. We can also help you with any additional steps you need to take to achieve GDPR compliance.

Intellectual Property

We understand how valuable your work is to you. Whether that is inventing a new medicine, devising a software programme or creating a new logo for your brand, your creations deserve the best possible protection. Not only protection from those who infringe your rights, but also from those who try to stop you exploiting your creativity without good reason. Understanding the strengths and vulnerabilities of your intellectual property (IP) is crucial to realising its benefits and full potential. We will help you to exploit your IP rights to the full.

Employment

We understand that your people are one of your key assets. A well-structured and engaged team who are driven to achieve your business objectives are key to your success. However, your people will also present challenges for you, whether these arise from day-to-day matters, departures, employment tribunal claims or changes to your workforce size or the way in which you work.

Our team can act as your HR team or as an extension of your HR team. Having got to know your team and your business, you'll receive technically excellent, pragmatic advice on any people challenges which arise, delivered at speed.

Business Restructuring and Insolvency

Understanding the commercial challenges businesses and their stakeholders face, we are renowned for our commercial, pragmatic and solutions-focused approach which comes from our breadth and depth of experience dealing with businesses in financial difficulty. We have extensive experience working with management, shareholders and other stakeholders to restructure and rescue businesses facing financial difficulty. Our team is a market leader in advising on formal insolvencies.

Real Estate

Every business needs support in dealing with property assets at some time. Whether you are a seasoned property developer or investor, a funder or a property owner or an occupier who uses your property for business, our team can help you. Although property transactions involve at least two parties, you are not really on opposing sides. We are about making things happen.

Debt Recovery

We specialise in providing credit control and debt recovery support. We design our support accordingly once we understand your business and your specific cash flow management requirements. We want to/have to understand your business, industry and credit control needs inside out. Our debt recovery service is fast, efficient and economical.

Regulatory

Regulatory duties can place a heavy burden on employers. Failure to comply with legal requirements relating to health and safety, food law and trading standards can lead to costly investigations, harsh penalties and damage your corporate reputation. We'll support you through internal and external investigations and help you to prevent the incident from happening again. And while we help put things right, we can also ensure that things work the way they should from the start.

Commercial - IT

We have years of in-depth understanding and experience of dealing with IT contracts across all levels of the private and public sector, working on projects of all shapes and sizes. We work for both customers and suppliers and so are alive to issues that should be considered by each party when entering into an IT transaction. Nothing is beyond us: we may help suppliers to develop and exploit a new IT solution, help customers take a simple software licence, or get involved in more complex IT outsourcing arrangements.

Dispute Resolution

Whether you are involved in a dispute that has arisen from a contract you seek to enforce or defend, or from other legal rights you or the other party may have, we can help you to resolve it by agreement or, if that's not possible, to achieve the best outcome through litigation or arbitration. Whilst the best approach is almost always to try to explore ways to settle the matter quickly before legal proceedings are commenced, we have a strong track record of litigating robustly and successfully to enforce or defend your rights, if that is what's required.

HR Consultancy

We complement the advisory capabilities of our employment law team and provide cost-effective, flexible HR expertise to help our clients' businesses get the best out of their people. From handling investigations, disciplinaries and grievances to preparing for and delivering any organisational change with a "people angle" to it, our highly experienced team can help. We have particular expertise in planning, communicating and implementing major programmes of change and helping a business shape, and recruit for, the new roles it needs to ensure its future success.

Private Wealth


We understand that your family, business and wealth will be the most important things in your life. One of the largest private wealth teams in Yorkshire, we ask questions; we get to know you and your family and your wishes; and we give you careful and considered help with your future plans. We are also happy to work alongside your other professional advisers to ensure a seamless and joined-up approach.

Family

None of us know what the future holds when it comes to our personal relationships. Whilst we all hope they will last, sadly not all do. During these difficult times - whether you're facing relationship difficulties, or parental issues - you want to team up with people who not only care about your situation but will back you up no matter what. Family law has a vital role to play in safeguarding your interests, whether financial, emotional or otherwise.

“Clarion is unique in that it provides services for all sides of the legal profession in the same building. The parties I have personally dealt with have been nothing but attentive, professional, and diligent. Having dealt with many other firms I can categorically say that this firm is by far one of the best I have ever dealt with for their quick and resourceful resolutions to issues which have needed their attention.”

– Chambers UK

The background is an abstract, marbled pattern of deep blue and purple hues. The colors swirl and flow together, creating a sense of movement and depth. The overall effect is reminiscent of liquid paint or ink being mixed together, with some areas appearing more saturated than others. The text is centered in the middle of the image, providing a clear focal point against the complex, organic background.

We ask questions,
we are curious,
we solve problems,
we develop
relationships.

Just some of the ways we add value

Strategies to add value to your business

Clarion has a proven track record of supporting businesses, by focusing on upfront investment in our relationship with clients. For us, 'adding value' means working together to address challenges and leverage opportunities for your business, whether through the direct delivery of our legal services, or through our general approach to making useful connections and encouraging business growth.

How we add value is bespoke to each client and throughout our relationship we'll always be looking for new ways of helping you.

Strategy Input

We invite you to take advantage of a two-hour strategy session with our Business Development Director, Steve Crow, on topics of your choice. Our Business Development team will continue to invest time in the relationship, providing market insights and introductions to organisations that may provide a 'route to market' for you. We also offer one annual strategy or board meeting attendance by your Relationship Partner and another partner, if relevant, without charge.

International lawyer network

Access to our informal international network of lawyers. If you wish to instruct directly, we would be pleased to put you in touch with our colleagues overseas or, where necessary, to source the appropriate firm for you without charging for our time.

We are also able to project manage international projects for you, to ensure you benefit from clear and commercial advice in English. This will mean you only need to deal with a single point of contact and will not need to be concerned by working in different time zones.

Employment law bulletins

Regular employment law bulletins with the latest case law updates.

Seminars/webinars/roundtables

Invitations to our extensive event programme which takes place throughout the year and presents a great opportunity to network and share experiences. Our events are always practical and, where appropriate, include experienced guest speakers.

Development of your young executives

We are committed to developing rising stars, whether they are Clarion's, our clients' or our contacts' stars. We do this by our own rising stars organising networking events for up-and-coming professionals, as part of our ClarioNet group, to help them develop networking skills and build connections that grow with them over their career.

Employee relationship support

Clarion is in a unique position to be able to provide a specialist service to our clients' employees through its team of experienced family and private wealth lawyers.

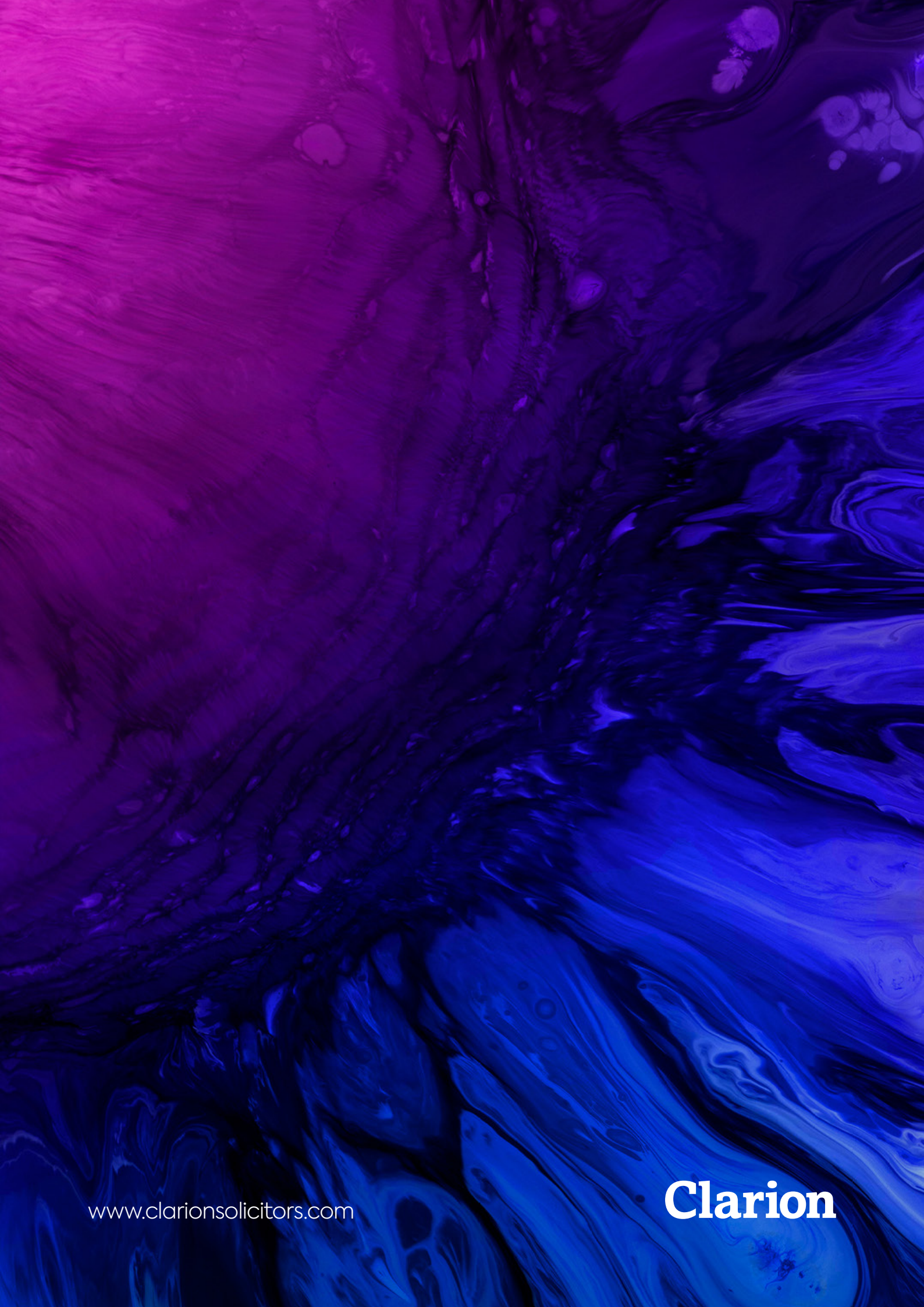
If desirable to you we can supplement your employee agenda by offering services and support to senior executives moving to the UK wishing to plan their families' and their own future, or who are dealing with the stress of administering family estates following bereavement. In relation to family matters, whilst employers cannot hope to prevent relationship breakdown, the effect of separation on the workplace can be minimised.

Our Family and Private Wealth teams can offer a free initial meeting with individual employees and, thereafter, the benefit of the same discounted hourly rates we offer to you for work undertaken to bring the matter to conclusion.

Business Team Training

A complementary 'legal awareness' training session delivered to you.

This is a one and a half hour training session intended to be delivered to the most appropriate people within your business. We have a number of topics from which you can select from including contractual legal awareness, liability and risk issues, advertising, data protection, debt management, dispute readiness amongst other topics. This training does not teach 'the law', but is intended to make non-lawyers aware of issues.



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