

## Patricia Bailey

**Associate**

**Birmingham**

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### About Patricia

Patricia Bailey joined the firm in February 2019 and qualified into the Pensions Practice Group in 2023. In addition to advising trustees and sponsoring employers in relation to defined benefit, defined contribution and life assurance schemes, Patricia assists with independent trusteeships where The Trustee Corporation has been appointed as an independent trustee.

Patricia is an active member of the firm's *pro bono* initiatives and volunteers as an adviser for the Pensions Ombudsman's early resolution service.

Patricia also volunteers as a mentor for Aspiring Solicitors.

### Experience

- Advising trustees and sponsoring employers in connection with member disputes.
- Advising on a range of aspects in relation to proposed investment structures.
- Review of benefit specifications in preparation for buy-in and codification of trustee discretions.
- Providing due diligence support in respect of corporate transactions.
- Review of cases and preparation of advice where trustees are required to exercise a discretion.
- Providing advice around member transfer cases that have been referred by administrators, including where the transfer is a non-statutory transfer.
- Assisting with data subject access requests.
- Drafting pension scheme documentation, including deeds of amendment, flexible apportionment arrangements, deeds of appointment and removal and documentation for the implementation of the General Code of Practice.
- Bespoke trustee training covering defined contribution and defined benefit schemes.

### Credentials

#### Education

- University of Birmingham, LL.M., 2011

- Birmingham City University, LL.B., Law with American Legal Studies, 2010

## **Admissions**

- England and Wales, 2023

## **Memberships & Affiliations**

- The Association of Pensions Lawyers

## **Expertise**

### **Services**

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- Pensions

## **About our firm**

One of the world's strongest integrated law firms, providing insight at the point where law, business and government meet. We deliver commercially focused business solutions by combining our legal, lobbying and political capabilities and invaluable connections on the ground to a diverse mix of clients, from long-established leading corporations to emerging businesses, startup visionaries and sovereign nations. More than 1,500 lawyers in over 40 offices across four continents provide unrivaled access to expertise.