Private Client

Issues you may be facing

- You are moving to the UK and want to structure your affairs in order to minimise your exposure to UK tax.
- In your role as trustee, you want to ensure you act within your powers and fulfil your duties.
- You want to plan the tax efficient succession of your estate.
- You want to establish a new structure to hold and protect your family assets.
- You are facing a dispute with a trustee, co-trustee or beneficiary.
- You want to take the management of your investments and affairs in-house with a family office.
- You are administering a complex estate with property and assets spread throughout the world.
- You have a second home in the UK and want to maximise the benefits of your non-resident or non-domiciled status.

How we can help

Our Private Client team advises on:

- The protection of wealth from taxation, from hostile and contentious claimants, and from problems arising out of succession issues.
- The use of UK and non-UK trusts, for succession, asset protection and tax planning purposes.
- Onshore or offshore investment structuring vehicles.
- A wide range of trust and estate disputes, in the UK and other jurisdictions.
- The structuring of offshore owners' UK assets to minimise their exposure to UK income tax, inheritance tax, capital gains tax and stamp duty land tax.
- The establishment and ongoing management of private and family offices.
- International probate issues.

Credentials

>
Appointed by the Bermuda Court to represent a group of minor children and their unborn siblings/cousins, in connection with a **major trust restructuring** and division of business assets in excess of $4 billion.

>
Acted for **principal beneficiary in High Court application** concerning powers of appointment under an English law trust - Howell & ors v Lees-Millais & ors [2009] EWHC 1754.

>
Advised in relation to the restructuring of a £30 million **Scottish sporting estate** to facilitate a £12 million inward investment to construct ecologically friendly hydro-electric power schemes.

>
Advised on the establishment of a **$100 million (Shariah law-compliant) offshore trust** for an Islamic settlor.

>
Advised on the establishment of a charity to purchase a **historic building in the heart of Berlin** for development as an academic site and the use of offshore vehicles to ringfence future funding.

TaylorWessing

Private Client

The team

Recognised as a market leader for many years, our Private Client team in London works closely with our Private Client practice groups in mainland Europe and the Middle East.

We are highly experienced in advising international families, private banks and fiduciary groups. We have particular expertise in advising so-called "new money" clients (entrepreneurs and members of the finance industry), as well as landed estates.

Our team includes specialists in financial services who are experts in advising on the establishment and management of a wide range of bespoke investment structures. It also includes property specialists who can advise on the purchase, financing, occupation and sale of all types of residential and agricultural property.

Through our cross-departmental Wealth group, we offer a unique and fully integrated service for the ultra-wealthy who need expert and joined-up advice on their personal wealth structures, tax planning, commercial investments and reputation management issues.

Working closely with our top-ranked Corporate law groups (who have a recognised specialism in venture capital and private equity), our Private Client lawyers are able to provide truly innovative answers to the problems of wealthy clients throughout the world.

The ethos at Taylor Wessing has always been to build a close and lasting relationship with clients. We offer a partner-led service with close partner involvement and supervision, whilst seeking to ensure that the right expert at the right level provides the advice.

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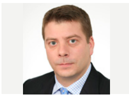

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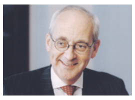

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Credentials

\>
Advised a number of families and their fiduciaries on the opportunity to take advantage of the **Liechtenstein Disclosure Facility**.

\>
Established a **limited partnership structure** with an investment of approximately £3.5 million for the purposes of mitigating income tax on income of approximately £170 million.

\>
Advised the **executors of a recently deceased UK domiciliary** from the entertainment world who left an estate in excess of £40 million over four countries and a minor child with US citizenship.

\>
Advised on the **tax-efficient restructuring** of a £30 million estate as part of the settlement of an Inheritance Act 1975 claim by the widow.

"The private client team here is regarded as one of the best in London. The majority of its workload has a cross-border dimension, and the team is well liked by its cosmopolitan client base for its ability to solve the most complex multi-jurisdictional tax and trust problems."

Chambers 2012 - First Tier Firm

WINNER STEP Private Client Awards 2011/12 Contentious Trust and Estates Team of the Year

Citywealth Leaders List 2011 RECOMMENDED

SHORTLISTED LEGAL BUSINESS AWARDS 2011 PRIVATE CLIENT TEAM OF THE YEAR

Private Client Practitioner top 25 most admired companies

SPEAR'S TOP FIVE

THE LAWYER AWARDS 2009 WINNER Private Client Team of the Year

Europe > Middle East > Asia

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