



Private Client in the UK

Taylor Wessing LLP's Private Client lawyers advise private clients on all wealth planning and asset protection matters, whatever their scale or scope. Our clients come from the UK and all over the world, and include individuals, families and international trust companies.

The firm's UK Private Client group has been recognised as a market leader for many years. It works closely with the private client practice groups in Germany, France, Brussels and Dubai.

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

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

Our services

Domicile and residence

Of prime importance to any tax motivated structure is a clear understanding of the client's tax status. Our lawyers provide an in depth analysis of a client's domicile and residence status supplemented, where necessary, by detailed correspondence with the relevant sections of HM Revenue & Customs.

Tax and succession planning

Our partners and associates are experienced in all aspects of UK taxation including inheritance tax, capital gains tax, income tax and stamp duty land tax. We can also advise personal and business clients on the use of double tax treaties. We add value to our clients' endeavours, advising on effective tax planning and the protection of wealth from taxation, from hostile and contentious claimants, and from problems arising out of succession issues.

Trusts and settlements

At the core of tax planning and asset protection for entrepreneurs and their families lies the use of trusts and settlements, established in the UK or offshore. The uses of trusts and settlements are still many and varied, despite changes in the fiscal rules, and they continue to provide excellent asset protection and tax planning opportunities for clients from other countries (even those whose own legal system does not recognise trusts).

Investment structures

We are also well placed to advise on investment structuring vehicles for wealthy clients and their families, onshore or offshore. Vehicles such as Authorised Unit Trusts (AUT) and Open Ended Investment Companies (OEIC) provide an opportunity for tax efficient wealth management. Our team includes specialists in financial services and our services extend through to the establishment and management of a range of bespoke investment structures.

Contentious issues

We advise trustees, executors and beneficiaries on a wide range of trust and estate disputes both in England and Wales and in other jurisdictions. These include Inheritance Act claims, testamentary capacity and undue influence, attacking and defending asset protection trusts, trustee mistake including rectification, rescission and Hastings-Bass principles, breach of trust, and removal of trustees and executors. We aim to diffuse conflicts at an early stage but where this proves impossible, subsequent court proceedings are handled cost effectively with the aim of protecting our clients from the unexpected and achieving the best possible outcome.

Management issues

In addition, whilst the firm does not engage in regulated activities within the meaning of the Financial Services and Markets Act 2000 other than in a purely incidental manner as part and parcel of our professional services, we have practical experience in establishing and maintaining private and family offices and assisting with management issues for the wealthiest of private clients.

Heritage property

For those clients fortunate enough to own or inherit significant and important works of art or real estate we advise in relation to the purchase, ownership, taxation and protection of this valuable class of asset.

Wills and probate

We advise on international probate issues, the drafting of wills in different jurisdictions, and the interplay between the succession laws of other countries. We aim, through asset protection structures, to avoid the difficulties that can arise through probate procedures for assets in different countries.

Property

Our property specialists advise on the purchase, financing, occupation and sale of all types of residential and agricultural property. We are experienced in acting for offshore owners and can advise as to the most appropriate structure, in different circumstances, to minimise the tax exposure on rental income, and to mitigate the impact of UK inheritance tax, capital gains tax and stamp duty land tax. We can, and frequently do, put clients in contact with those offering offshore company and financial services.

Family and matrimonial

We believe it is important to cover all aspects of an individual's legal needs. Our team therefore includes specialists in matrimonial and family issues and contentious matters arising in matrimonial and succession/inheritance disputes. We concentrate on providing a service that is effective, discreet and sympathetic.

Our approach

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. Our private client skills are based upon the historical origins of our practice, the breadth and complexity of the problems we solve on a day to day basis, and the experience of our partners and staff.

Our partners and associates have a long tradition of providing a timely and understanding service for clients from all over the world. We maintain close working relationships with expert advisers and service providers in all recognised low tax and developed jurisdictions.

Finally, one of our key objectives is to provide high quality legal services on a cost effective and competitive basis.

Lead Partners and Consultants - Private Client



Mark Buzzoni
Trust/Tax Planning
E-mail m.buzzoni@taylorwessing.com



Martin Goodwin
Tax/Business Assets
E-mail m.goodwin@taylorwessing.com



Andrew Hine
Trust/Tax Planning
E-mail a.hine@taylorwessing.com



Joanna Ward
Property
E-mail j.ward@taylorwessing.com



James Ferguson
Family/Matrimonial
E-mail j.ferguson@taylorwessing.com



Bibi Fortin Lees
Trust/Tax Planning and Cross Border Estates
E-mail b.lees@taylorwessing.com



Nicholas Warr
Trust/Tax Planning
E-mail n.warr@taylorwessing.com



Andrew Goodman
Trust & Tax Planning
E-mail a.goodman@taylorwessing.com



Steve Kempster
Trust & Estate Disputes
E-mail s.kempster@taylorwessing.com



Philippa Blake-Roberts
Investment Structures
E-mail p.blake-roberts@taylorwessing.com



Michael Stanford-Tuck
International/Asset Protection
E-mail m.stanford-tuck@taylorwessing.com

Berlin
Ebertstraße 15, 10117 Berlin
Tel +49 (0)30 88 56 36 0
Fax +49 (0)30 88 56 36 100

Brussels
Trône House, 4 Rue du Trône
B-1000 Brussels
Tel +32 (0)2 289 6060
Fax +32 (0)2 289 6070

Cambridge
24 Hills Road, Cambridge, CB2 1JP
Tel +44 (0)1223 446400
Fax +44 (0)1223 446401

Dubai
P.O. Box 33675
28th Floor Al Moosa Tower II
Sheikh Zayed Road
Dubai, United Arab Emirates
Tel +971 (0)4 332 3324
Fax +971 (0)4 332 3325

Düsseldorf
Königsallee 92a
D-40212 Düsseldorf
Tel +49 (0)211 83 87 0
Fax +49 (0)211 83 87 100

Frankfurt a. M.
Senckenberganlage 20-22
D-60325 Frankfurt a. M.
Tel +49 (0)69 971 30 0
Fax +49 (0)69 971 30 100

Hamburg
Hanseatic Trade Center
Am Sandtorkai 41, 20457 Hamburg
Tel +49 (0)40 36 80 30
Fax +49 (0)40 36 80 3280

London
5 New Street Square
London, EC4A 3TW
Tel +44 (0)20 7300 7000
Fax +44 (0)20 7300 7100

Munich
Isartorplatz 8
D-80331 Munich
Tel +49 (0)89 2 10 38 0
Fax +49 (0)89 2 10 38 300

Paris
42 avenue Montaigne
75008 Paris
Tel +33 (0)1 72 74 03 33
Fax +33 (0)1 72 74 03 34

Representative offices:
Alicante
Paseo Explanada de España No. 1
4-Izda E-03002 Alicante, Spain
Tel +34 (0)96 51 42 805
Fax +34 (0)96 52 00 248

Beijing
Unit 1503, Prosper Center, Tower 2
No. 5, Guanghua Road, Chaoyang
District, Beijing 100020, China
Tel +86 10 8587 5886
Fax +86 10 8587 5885

Shanghai
15th Floor United Plaza, Unit 1509
No. 1468, Nanjing West Road
200040 Shanghai, China
Tel +86 21 6247 7247
Fax +86 21 6247 7248

www.taylorwessing.com

A legal force for Europe

Based in the UK, France, Germany, Brussels and Dubai, as well as representative offices in Alicante, Beijing and Shanghai - Taylor Wessing LLP provides the full range of legal services to major corporations, financial and public institutions, growing enterprises and wealthy private clients.

Taylor Wessing has an enviable track record in serving knowledge-based and technology-orientated businesses. A market leader in intellectual property, the firm also has a strong market presence in corporate, finance and wealth planning.

Our services

- **Corporate** - M&A, IPOs, Private equity, Tax, Commercial law, Inward investment, Funds
- **Intellectual property** - Patents, Copyright, Trade marks, Confidential information
- **Finance & projects** - Banking, Structured finance, Major projects
- **Dispute resolution** - Litigation, Arbitration, Mediation
- **Reconstruction and corporate recovery** - Restructuring, Work-outs, Formal insolvency

- **Real estate** - Investment, Development, Finance, Planning and environment
- **Employment & pensions** - Employee benefits, Human resources, Pensions, Pensions litigation
- **Competition** - EC law and anti-trust
- **Regulatory** - Public law, Financial services
- **Private client** - International asset protection, Tax and succession planning

Specialist Services

- Tax planning
- Offshore settlements
- Trusts and estates
- Family office work
- Domicile and residence
- Asset protection
- Investment structures
- Double tax arrangements
- Residential Property
- Family issues
- Mergers and acquisitions
- Inward investment
- Company start-ups
- Strategic alliances and partnering
- Private and public offerings
- Debt, mezzanine and equity funding

- Intellectual property asset-specific funding
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- Technology transfers
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- Due diligence
- Competition law
- Intellectual property protection strategies
- Outsourcing
- Data protection
- Confidentiality and trade secret agreements
- Internet-related advice
- Supply and procurement
- Software and hardware distribution
- Employment and immigration
- Consultancy agreements
- Restrictive covenants
- Employee incentive schemes
- Intellectual property rights enforcement
- Anti-piracy programmes
- Supply/procurement dispute resolution
- Mediation
- Arbitration
- Litigation
- Property and construction



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