Services for estates, charities and trusts

Proactive advice on tax and planning issues

Our approach is based on a thorough understanding of our clients' requirements. Through continuous discussions with the trustees we ensure we understand the purpose of the trust or charity and the expectations of the trustees and the beneficiaries.

Our team is headed up by director Stephanie Parker. Stephanie specialises in advising trustees and executors on technical and tax planning issues. She also provides support on tax and accounting matters to other professionals, in particular legal advisors, to help them support their client base.

Our support systems for clients ensure that trustees, executors and beneficiaries are proactively advised on tax and planning issues.

Trusts and estates

Our team has many years of experience advising on trusts and estates at all stages of their lifecycle. Our client base varies from the very large and complex trusts and estates, to trusts and estates holding a small number of assets.

We also have considerable experience in dealing with the taxation and administration of overseas trusts and the UK tax issues that affect the settlors, beneficiaries and trustees of such trusts.

We are involved in advising executors in all aspects of estate administration. We work closely with solicitors to ensure that all compliance matters are completed in a timely and efficient manner.

Charities

Advising charities on tax, accounting and compliance matters forms a major part of our practice. We have extensive experience in all aspects of regulatory audit and independent examination requirements and have many years of experience in dealing with the requirements of the Charity Commission.

The challenges facing the charity sector are complex. Changing regulations, increasing statutory obligations and the help required by trustees to fulfil their fiduciary duties are real issues. We can guide trustees in all these areas.

What we can do for our clients

- We can act as trustees and executors for clients.
- Proactive tax planning for executors, trustees and beneficiaries to minimise tax and maximise wealth.
- The preparation of annual accounts or more frequent financial statements/management accounts as required.
- A complete tax compliance service for trusts and estates to guide trustees through the self assessment system.
- A complete administration service for trusts, estates and charities.
- We work closely with the legal advisors, investment managers and bankers for the trusts and estates.
- The preparation of tax repayment claims.

For more information, please contact:

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