Private client services

PERSONAL TAX AND FAMILY WEALTH MANAGEMENT

Helping you mitigate tax and preserve your wealth.

Are you concerned that you may be paying too much tax? Are you worried that you may not be getting the best advice on tax planning issues and the management of your family wealth? If so, our client-focused, multi-disciplinary approach can help you.

Whatever your background we can assist with tax mitigation, strategic planning, the preservation of wealth and passing it on to the next generation.

Our private client services team consists of highly experienced specialists advising on UK and international tax and trust issues. We are people focused and partner-led and our experience comes from many years of working alongside people like you, understanding your needs and providing the best solutions.

THE ISSUES FACING YOU

Most firms of accountants can deal competently with the preparation of tax returns but you need something more- someone who will guide you through the complexities of our tax system but who will also help you to achieve your financial objectives in a tax-efficient manner.

You may be concerned about how to:

- minimise your tax liabilities;
- plan for your children's inheritance;
- plan for business succession;
- mitigate capital gains and inheritance taxes; or
- make provision for your retirement.

We can help you to deal with each of these issues and we will do so with a high level of personal contact and using language that you will understand.

UNDERSTANDING YOUR INDIVIDUAL REQUIREMENTS

We offer all new clients a free initial meeting. We use this meeting to assess your situation, listen to your concerns, pinpoint any problem areas and then to suggest how we can best help you.

We will provide you with an estimate of costs before carrying out any work for you.

As part of our ongoing service we like to meet with you at regular intervals to ensure you are getting the best advice from us.

We aim to point out any problems that may be looming, as well as identify any opportunities that may arise, well in advance.

PROVIDING YOU WITH A FULL RANGE OF SERVICES

More detailed information can be found on separate service sheets available via our website or in hard copy form.

Topics covered include:

- income and capital gains tax planning and mitigation;
- succession and inheritance planning;
- services for trustees and executors;
- dealing with HM Revenue & Customs enquiries, investigations and disclosures;
- taxation of non-domiciliaries; and
- remuneration planning.

We are people focused and partner-led and our experience comes from many years of working alongside people like you.

Rather than read about us, however, why not phone and fix that first appointment? We can discuss your precise circumstances and remember, it is free of charge.

FINANCIAL ADVICE

UHY Hacker Young do not directly offer regulated financial advice, but such services are provided at most of our offices through specialist divisions manned by independent financial advisers. They can advise on pension strategies, life and sickness cover, and investments and we will work closely with them (or, if preferred, your existing financial adviser). Please speak to us and we can put you in touch with an independent financial adviser in your local office.

THE NEXT STEP

If you would like further information on our private client and wealth management services, or would like to arrange a meeting to discuss your specific requirements, please contact one of our partners.

For further information please contact your usual UHY adviser or read more about us on our website at www.uhy-uk.com.