



Private client services

## SERVICES FOR TRUSTEES AND EXECUTORS

**Protecting  
your wealth  
and that of  
future  
generations.**

Do you want to protect vulnerable family members, or ensure that your wealth is passed safely down amongst the generations? Perhaps you want to protect your estate from onerous taxes, or you want to establish a charitable trust or foundation. If so, our highly regarded private client services team can help.

With a significant client base, ranging from some of the UK's largest charitable trusts and offshore structures to many smaller arrangements protecting family wealth, we have successfully catered for our clients' needs for many years.

### CATERING FOR ALL YOUR NEEDS

Our specialists, highly experienced in dealing with both the complex and the straightforward, can assist you in a variety of areas; with formulating your plans and putting them into effect, in making best use of existing structures and ensuring their efficient administration, and in releasing funds to beneficiaries in a tax-effective manner.

### OUR TRUST SERVICES

Trusts can be created for many reasons and are a highly flexible means of managing your assets.

Legally, however, they are complex and their provisions may vary considerably. With a wealth of knowledge and experience, our dedicated team can provide you with a proactive and efficient service, giving you the assurance that you have placed your work in safe hands.

We are flexible in our terms of engagement and can assist you to setup the most tax efficient tailor-made structures, best suited to your needs and those of your loved ones.

### TAX PLANNING

Many people are unaware how useful trusts can be as a tax planning tool. Whether your aim is to mitigate potential tax liabilities or simply exercise control over succession, we can provide tax planning advice and assistance with setting up, running and winding down trusts, both here in the UK and overseas.

### CHARITABLE TRUSTS

As well as completing accounts in the statutory format, we can provide you with full administrative support and advise on tax efficient structures and VAT issues.

Where the charitable trust is substantial, we can provide a vetting system/ committee for 'good causes' looking for donations.

### APPOINTMENT AS TRUSTEE OR EXECUTOR

Our professional trustees and executors bring a wealth of experience to the task, and may already have considerable knowledge of your family and their tax affairs.

Being independent of disputes, we are also able to fulfil a mediator's role while ensuring adherence to the terms of the trust and the wishes of the settlor/ testator.

Protect  
your estate  
from onerous  
taxes.

## SERVICES FOR EXECUTORS

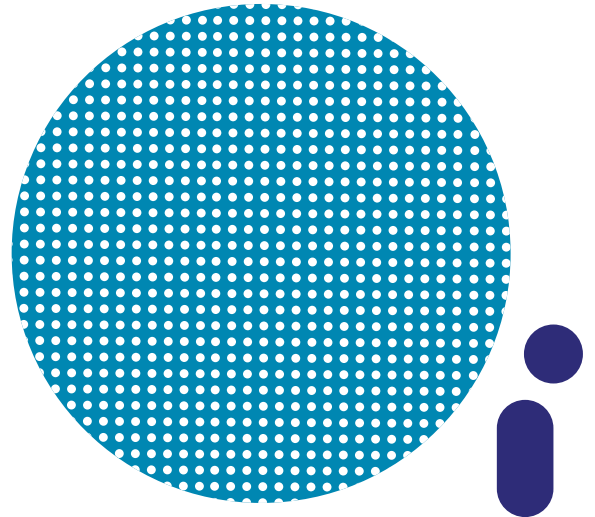
If you happen to be named as an executor it is likely that you will choose to seek professional advice to assist you with the more complex and technical stages of what may be a drawn out and emotionally draining process.

Our specialists have the combination of experience and sensitivity that can ensure that your estate, or that of a friend or family member, will be handled professionally, whilst reducing the burden upon the executors.

## THE NEXT STEP

Call us to arrange an initial meeting - free of charge - to discuss your circumstances and requirements. We can then suggest how we can best help you and provide a quote in advance for any work you ask us to carry out.

**For further information please contact your usual UHY adviser or read more about us on our website at [www.uhy-uk.com](http://www.uhy-uk.com).**



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