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MAKING IT HUMANLY POSSIBLE

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–Let's talk about

Private Tax & Family Business

The Pitmans' Perspective on:
Private Tax & Family Business

"Lateral thinking with practical planning for today's constantly changing tax world."

What we do: Inheritance tax, income tax and capital gains tax planning; wills and probate; trust and estate disputes; international tax planning involving individuals and their businesses; all areas of domicile and residence planning; establishment of UK and overseas trusts; personal and trust tax planning; lasting powers of attorney and advice on the Mental Capacity Act 2005; advice on property ownership and management.

Who we act for: Individuals, families and owner-managed businesses.

Our expertise: An in depth knowledge and understanding of trust, probate and tax law which leads to practical solutions for clients.

Our service: There is a continuing need for good practical advice for families and their advisers in the creation and preservation of wealth. Our team's wide experience over many years of practice will guide you through the ever-changing complexity of current taxation rules, providing tax and related legal advice tailored to reflect your practical needs.

How we are different: Our approach is highly personal and partner led.

Our experience is wide and deep to deal with straightforward and complex issues alike.

We focus on what it is that is wanted to provide practical solutions.

We have a wide range of established relationships to get more specialist input if needed, from counsel and other experts in the UK and abroad.

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UK Tax Planning

- Personal tax planning for individuals, their families and businesses
- Advising UK resident non domiciliaries
- Advising foreign executives working in and out of the UK
- Capital gains tax planning and business exit strategies
- UK property and other investment structures
- Handling and co-ordinating tax enquiries and investigations
- Business taxation
- Indirect taxation

Trusts and Wealth Structuring

- Setting up and running UK and international trusts
- Designing and implementing plans/structures to suit family and business needs
- Breaking and varying trusts
- Contentious trust advice to trustees and beneficiaries and dispute resolution in relation to UK and international trusts
- Modernisation and consolidation of existing trusts

Probate & Succession

- High net worth estate and inheritance tax planning for tax mitigation and asset protection purposes
- Succession planning strategies through Wills, trusts and other structures
- Probate and estate administration
- Administering estates with foreign assets and multi-jurisdictional considerations
- Post death tax planning

Cross Borders & International

- Offshore tax planning with trusts and companies for multi-jurisdictional clients
- Residence and domicile planning for individuals and businesses who are arriving /leaving the UK
- Cross border business and investment structures
- Use of overseas vehicles for tax deferral
- International pensions planning
- Anstalts, foundations and stiftungs, and family limited partnerships
- Managing and co-ordinating foreign jurisdictional tax and legal complexities

Pensions

- Advising on discretionary trust issues arising under both occupational and personal pension schemes
- Specialist knowledge of Self Invested Personal Pensions (SIPPs) and Qualifying Recognised Overseas Pension Schemes (QROPs)
- Drafting plain English pension documentation
- International pension planning
- Advising on a wide range of pension topics such as compliance, trustees' investment duties, winding up and restructuring, pension scheme mergers and pension scheme conversions

Recent Work

- Advising clients on the complex new remittance rules now applying to non UK domiciliaries
- Handling enquiries by HMRC into residence, not ordinarily resident status and, separately, offshore structures held by UK resident and domiciled individuals
- Advising on ongoing matters involving an offshore excluded family property trust with investments in the UK and Eastern Europe
- Advising a US client married to a UK national in respect of trust and succession matters
- Advising various professional trustees on strategies to avert formal litigation, or (where this option is unavailable) conducting proceedings
- Advising executors on appointment /variation to secure Inheritance Tax neutrality where charitable beneficiaries were involved