



Private Client

Effective Solutions for Individuals



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SOLICITORS

UK Corporate Law Firm of the Year
ACQ Magazine Awards



Private Client

Services for Individuals

“Alison Voyce is recommended for her knowledge, charm and speedy responses.”

The Legal 500

Ensuring you receive the right advice for your circumstances is essential when selecting a lawyer to handle your personal affairs. Taylor Walton’s Private Client Department is substantial, consisting of four partners, solicitors, paralegals and experienced support staff. We aim to offer a bespoke service to all our clients however complex their circumstances. This brochure provides only a brief summary of our services and depth of experience. A more wide-ranging review can be found on our web site.

Key issues which we handle are:

- Lifetime and post-death estate planning, including farms, businesses and landed estates
- Will drafting
- Trust formation and administration
- Succession planning for family businesses and farms
- Estate administration
- Contentious probate
- Lasting Powers of Attorney and Enduring Powers of Attorney
- Court of Protection and elderly client work
- Charity formation

The Legal 500 ranks our Private Client department as one of only three premier firms in the Beds, Bucks, Herts and Middlesex region. We are particularly experienced in dealing with complex tax planning arrangements and family issues.

Recent instructions include:

- advising on the devolution of a double trust scheme within a family involving property transfers, to minimise pre-owned asset tax as well as inheritance tax
- tax planning advice through wills and lifetime trusts for different generations of a family involving the devolution of various family business interests and properties
- advising on the administration of a deceased person’s estate, consisting of residential and commercial property, farmland, and a double trust scheme
- advising the Partners of a family farm Partnership (being different generations of the same family) on issues concerning succession and lifetime gifts for tax-planning purposes
- advising the adult children in connection with a claim against their late Father’s extensive estate by his former girlfriend

■ Estate and Succession Planning

The devolution of family wealth requires careful consideration to secure the long-term survival of any ongoing business and the welfare of its employees, as well as minimising any exposure to capital gains tax and inheritance tax for family members.

Taylor Walton can provide specialist succession planning advice for business owners, farmers and other high net worth individuals. We work in conjunction with our award-winning corporate department and other departments in the Firm, as well as the client's other professional advisers, to ensure the best strategic choice for the future.

■ Wills, Trusts and Estate Administration

Having a properly drafted will is essential for everyone, but particularly for people with more complex affairs. The appropriate use of lifetime trusts can also be an effective solution in estate planning, providing control over who benefits and when. Trusts can be important in managing problems when passing assets to succeeding generations, especially if there are complex family issues.

The wide experience of our Private Client department in dealing with Trusts and Estate Administration distinguishes Taylor Walton from many other law firms.

We act for individuals and trustees and often have work referred to us by large City accountancy firms and other professionals. All our senior lawyers are members of the Society of Trust and Estate Practitioners (STEP).

■ Enduring & Lasting Powers of Attorney and the Court of Protection

Having a Lasting Power of Attorney prepared is an important decision and should only be done after taking proper legal advice. Your attorney(s) must be known to you and completely trusted by you. After all, he or she will potentially have authority to deal with your finances or make healthcare decisions on your behalf.

Our lawyers are experienced in dealing with the issues raised by LPAs and existing EPAs. We also have extensive experience in dealing with the Court of Protection in relation to the welfare of people who lack the mental capacity to handle their own affairs.

■ Contentious Probate

Taylor Walton has substantial experience and a long track-record of success in advising Claimants, Defendants, Executors, Administrators and Trustees on disputes. We welcome enquiries on all contentious probate and administration matters.

We are particularly experienced in dealing with complex tax planning arrangements and family issues.

About

Taylor Walton LLP

Taylor Walton is an award winning law firm based in South-East England, providing cost effective legal services to businesses and individuals. The firm was voted UK Corporate Law Firm of the Year 2009 by readers of Acquisition Finance magazine.

We strive to keep clients one step ahead of the law, including regular free seminars and legal updates. Based strategically close to, but not in London, we also offer highly competitive fee rates. As confirmed by leading independent directory Chambers & Partners:

“One of the huge benefits is that you get easy access to partners with City experience but don't have to pay City firm prices”
and *“Great dedication to its clients”*

We have key strengths in commercial property, corporate transactions, employment and dispute resolution, and specialist areas including technology & outsourcing, professional negligence and business immigration.

Our private client teams are recognised for their expertise in assisting individuals with estate and tax planning, trusts and probate, together with matrimonial matters and home conveyancing.

We recognise our corporate social responsibility. Taylor Walton takes a very active role in supporting local community initiatives, reducing our impact on the environment and acting responsibly in our buying decisions.

Contact

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Taylor Walton is an award winning law firm based in South-East England, providing cost effective legal advice to businesses and individuals. We are committed to providing jargon free advice, and equipping clients for success with regular seminars, workshops and legal update bulletins.

Business Services include:

Commercial Property ■ Landlord & Tenant ■ Company Restructuring ■ Commercial Contracts ■ Corporate Finance ■ Banking and Security ■ Mergers & Acquisitions ■ Insolvency ■ Construction ■ Employment Law ■ Commercial Disputes ■ Technology & Outsourcing ■ Professional Negligence ■ Intellectual Property ■ Corporate Relocation ■ Lenders' Services ■ Business Immigration

Services for Individuals include:

Home Conveyancing ■ Inheritance Tax Planning ■ Wills, Trusts & Probate ■ Enduring Powers of Attorney and Lasting Powers of Attorney ■ Court of Protection ■ Divorce & Separation ■ Childcare Issues ■ Financial Settlements ■ Pre- & Post-nuptial and Co-habitation Agreements ■ Civil Partnerships and Dissolution ■ Dismissal & Redundancy ■ Employee Relocation ■ Succession & Exit Planning

