



**LA's Tax and Trusts Team is renowned for its longstanding experience and its straightforward yet innovative approach to its clients' individual circumstances and objectives.**

#### **About us**

We work as part of a wider private client team that is widely regarded as unsurpassed in southern England for its expert knowledge of tax, trust and probate matters. Our reputation rests on our expertise, our willingness to focus on clients' needs and on our commitment to establishing lasting personal relationships.

#### **Our services**

##### *Tax planning*

We specialise in identifying high value asset tax-saving strategies for owner managed businesses and private individuals, with a particular strength in offshore tax planning.

Our team will approach your financial affairs sensitively and confidentially. We fully appreciate that each of our clients has different goals and objectives and our aim is to assist our clients in achieving those goals and objectives in the most tax-efficient manner possible without "letting the tax tail wag the commercial dog". Members of the team are happy to provide advice on one particular aspect of a client's affairs or to add value across the fuller picture.

Our specific areas of expertise include:

- Planning for inheritance tax
- Managing capital gains tax
- Offshore tax planning
- Owner managed businesses
- Taxation of employees
- Creation of charitable trusts

##### *Creation and Termination of Trusts*

Trusts are an excellent way of assuming planned control over assets, protecting the interests of beneficiaries from creditors or failed relationships, and saving tax.

We specialise in the creation and termination of trusts, as well as being well placed to advise in complex matters of dispute.

Our lawyers will work with you to understand your family and business circumstances before identifying the most workable and cost-effective solutions.

We can also help in relation to the creation of charitable trusts.

##### *Trust Administration*

The members of our trust administration team are specialists in the administration of trusts. They administer the full range of trusts, including discretionary trusts, life interest trusts, protected trusts, controlled trusts, trusts for disabled persons and trusts for minors.

Our trust administration services include preparation of yearly accounts, completing and filing tax returns, advising on trustees' duties and distributing income and capital.

Our administration of a trust is carried out in full consultation with the relevant settlors, trustees and beneficiaries to ensure that the trust continues to meet its objectives and continues to provide for the changing needs of beneficiaries. We are also well placed to advise on further possible tax saving opportunities using existing trusts.

#### **Our approach**

We are friendly and approachable. Client care and satisfaction is our main aim. We take great care to identify your individual circumstances and objectives to ensure that we deliver tailor-made and sustainable solutions that work hand in hand with your personal goals.

Our intention is to make legal processes as simple and straightforward as possible. Our documents and letters are written in plain English with the minimum of legal and tax jargon. We will often be able to visit you at home if this is more convenient.



**Barry Glazier**, who has been a partner with LA for over 35 years, heads the Tax and Trusts Group. Barry was president of the Dorset Chamber of Commerce and Industry 1992-93, the president of Bournemouth and Dorset District Law Society 1991-92; a director and the company secretary of Dorset Training and Enterprise Council 1989-2001, the Chairman of Eurolegal 1991-95. He is also a notary public, a member of the Society of Trust and Estate Practitioners and a Fellow of the Institute of Directors. He has lectured nationally on tax and trust issues.



**Richard Fairbairn** is a partner in our London office, where he has headed the private client department for some years. He has experience in most aspects of private client work, including internationally. A French speaker, Richard has been made a Chevalier of L'Ordre National du Mérite in recognition of his work for the French Embassy.

Barry and Richard are assisted by associate solicitors Natalie Gamble, Emily Copping, by solicitors Paula Weir, Mahendree Naidoo and Sarah Roberts, by chartered tax adviser Michael Norton, by tax and trust advisers Mark Barnaby and Mark Chant and by trust administrator Vicki Stowells.

### What our clients say

"Friendly, personal and efficient"

Ms Holder

"Always found LA services friendly and professional and would be perfectly happy to recommend them"

Mrs Freeman

"Superb service from start to finish"

Mr and Mrs Cole

"I see no way in which your service could be improved"

Mr Finlayson

"1st class advice and service"

Mr Tucker

### What others say about us

Chambers and Partners are a leading independently researched directory of legal services. The guide recommends LA as a leading firm in the area for trusts and personal tax.

"Lester Aldridge's private client group is a specialist unit confidently providing a full range of services. The firm is particularly noted for its "absolutely superb" inheritance tax planning work. The star of the department is Barry Glazier, described as "a very able and astute adviser who gets on well with clients."

### Contact us

For help and advice on any aspect of Tax and Trusts, please call:

**Barry Glazier** on **01202 786186** or email [barry.glazier@LA-law.com](mailto:barry.glazier@LA-law.com)

**Richard Fairbairn** on **020 7400 9805** or email [richard.fairbairn@LA-law.com](mailto:richard.fairbairn@LA-law.com).