





protecting your wealth

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Alan heads up our taxation, trust and probate services team. This encompasses all aspects of tax planning, capital taxation and the use of trusts, giving advice on how individuals can protect their wealth and pass assets to the next generation in a tax-efficient manner.

Tax & trust planning

Taxation

As tax legislation on income tax, capital gains tax and inheritance tax becomes more complicated, everyone who is subject to tax needs professional advice, simply completing your tax return on time is no longer sufficient.

Would you like to minimise your income and capital gains tax liabilities? Find out more about inheritance tax planning and protecting your assets or passing them down to the next generation in a tax efficient manner. We offer dedicated services, often in conjunction with our independent financial adviser, Griffiths Financial Planning.

Trusts

Trusts are a tax-efficient way of leaving assets to future beneficiaries outside the inheritance tax net. Once planning ideas, used only by the very rich, they are now in more common use as the value of property and estates continues to rise.

Recent legislative changes mean that this area requires increasingly specialist knowledge, which we apply in all cases. We can help you choose and set up the most suitable one for your needs. We also provide full accountancy services, including preparing accounts and tax returns and if appropriate, we can act as trustees.

We can help you take better advantage of tax opportunities and relief's, achieve optimum capital or revenue tax treatment and make the most of tax opportunities specific to your industry. If necessary, we can act on your behalf in discussions with the tax authorities.

Probate

Probate is the process of collecting together a deceased person's estate and dividing it between the beneficiaries.

We work with executors and administrators of wills at various stages during probate. We have extensive knowledge of reliefs that can be claimed in order to mitigate the inheritance tax payable. With careful planning and discussing future intentions it is possible to use values for probate that are beneficial for future capital gains tax transactions.

Corporate Tax

Efficient tax planning can lead to significant improvements to your bottom line. We live in an increasingly regulated global business environment.

Reliable and up-to-the-minute taxation advice is vital to the success and profitability of your business. Important though they are, tax affairs often tie up valuable management time and effort. Our team can take away the stresses and strains.

Whatever the size of your business, we will incorporate tax efficiency into your planning and decision-making, as well as taking care of returns and paperwork, leaving you more time to manage your business.

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