Tax and wealth 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
The use of trusts for tax planning are very common as the value of property and estates continues to rise. We use our specialist knowledge to help you choose and set up the most suitable trust for your needs.

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. 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. We also advise you on tax opportunities and reliefs and can act on your behalf in discussions with the tax authorities.

Wealth Management
Our aim is to deliver effective wealth management solutions, which combine financial planning, taxation and other services as part of a more holistic approach to client service. Effective financial and tax planning is about people and lifestyles, rather than 'products' and our role is to help balance your long-term financial goals with current and future cash needs.

Testimonial

"Ellacotts responses are prompt, to the point and they are always able to apply their technical knowledge and experience in a practical and simple way to the matter in hand. Alan has been proactive by asking me "What if...?" to give me an idea of other options and issues to consider so that I can keep my tax bills to a minimum."

John Forkun

KEY CONTACT

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