

COLLYER BRISTOW

PRIVATE WEALTH

TAILORED SUPPORT FOR
INDIVIDUALS AND FAMILIES



**“WE ARE COLLYER
BRISTOW - THE
LAW FIRM FOR
THOSE THAT VALUE
INDIVIDUALITY
CREATIVITY AND
COLLABORATION”.**

We are a long-established law firm providing high quality, individually tailored legal advice to a portfolio of international and domestic clients including businesses, wealthy individuals & families, and ambitious entrepreneurs.

Our clients choose Collyer Bristow because they, like us, appreciate individuality, creativity and collaboration. They recognise that their needs may be unique and more complex, or that in progressing with their legal issue they value a more engaged and personalised service from their lawyers. They recognise that the Collyer Bristow approach is one of building understanding, trust and relationships with clients; that we treat people as individuals and

not as numbers. Our clients enjoy engaging with our lawyers because we are humans, not computers, with personalities and distinctive qualities. They see the value in knowing that the lawyers they meet on Day One will be the same lawyers they engage with throughout.

Whatever the issue, with our clients we are in it together, sharing the same ambition and determination and working together to deliver the best solutions to move them forward. This is why clients choose Collyer Bristow. Not just for the breadth and quality of our legal services, but for the individuality, creativity and collaboration we celebrate in every client and bring to every instruction.

OUR SERVICES

SUPPORT FOR THE DAY TO DAY, SUPPORT FOR THE COMPLEX.

We assist wealthy individuals, families, typically entrepreneurial and international, and family offices in building businesses, preparing for succession, managing homes, dealing with investments, resolving family issues, protecting their privacy and fulfilling their philanthropic aims.

Specialising in complex wealth structuring, we work closely with individuals and families based in the UK and overseas to protect their wealth now and in the future.

CHARITY & PHILANTHROPY

ESTABLISHING A CHARITABLE LEGACY FOR YOU AND YOUR FAMILY.


At a point where the accumulation of your wealth has ensured the financial security of your family you may wish to consider your lasting legacy and turn your attention to how your wealth could be used to reflect your personal values and make a difference to causes of importance to you. This could involve creating your own charity or foundation, establishing a trust to benefit several existing charities, or leaving a gift to a chosen charity in your Will. To be confident that you are providing the best possible support to your chosen causes, you should work with advisers with a thorough knowledge of charity law and the expertise to structure your charitable giving appropriately.

Our team advises wealthy individuals and families on the creation and registration of a range of vehicles for charitable giving.

We work with you closely to gain a full understanding of your philanthropic objectives so we can develop a tailored and pragmatic strategy to support you in fulfilling these aims, whilst maintaining the greatest tax efficiency.

Once the charitable entity has been established, we can provide you with proactive guidance on its governance and day to day running. This could cover fundraising and tax, preparing funding agreements, compliance and regulatory work, trading subsidiaries, corporate sponsorship and restructuring including incorporations, mergers and group re-organisations.

Our team offers a bespoke, personal service and is committed to ensuring that the charitable intentions of you and your family are fulfilled exactly as you would envisage.

A photograph of a forest with tall, dark evergreen trees under a clear blue sky. In the foreground, there is a field of green grass and numerous small, light purple flowers. A white rectangular box is centered in the image, containing text.

**“A WELL SIZED TEAM
THAT BENEFITS FROM
HIGH-CALIBRE LAWYERS
WITH A BROAD DEPTH OF
KNOWLEDGE AND EXPERTISE”**

LEGAL 500, LEGAL DIRECTORY

TRUST AND ESTATE DISPUTES

With an ageing and increasingly wealthy population and the rise of more diverse family structures, disputes over trusts and estates have become more prevalent. You may not have received what you had anticipated from an estate, have concerns about how a trust is being managed or be questioning the validity of a will or gift. Pursuing or defending a claim can be distressing for those involved with the potential for acrimony to arise within families. To support you in navigating these challenging situations, you should be working closely with advisers who can provide you with pragmatic guidance with sensitivity and discretion.

TAILORED GUIDANCE WITH SENSITIVITY AND DISCRETION

Our Trust & Estates Disputes lawyers advise executors, trustees and beneficiaries, in the UK and internationally, on the action to take when a dispute occurs over the administration of a trust or an estate. No client or set of circumstances is the same so we take the time to gain an in-depth understanding of the intricacies of the situation. We can then work with you to develop an individually tailored strategy to help you achieve the best possible outcome.

Wherever possible, we aim to achieve early resolution. However, when litigation is unavoidable, we have the expertise to guide you skillfully through the process. Our team prides itself on producing innovative solutions for clients and has the expertise to resolve high-value, complex disputes involving multiple jurisdictions.

TRUST AND ESTATE DISPUTES

WHAT IS CONTENTIOUS PROBATE?

Contentious probate is any legal dispute relating to a person's estate after their death. It's an umbrella term that covers a wide range of claims, including:

- Disputes over the validity of a will
- Challenges to the executor's powers or decision-making
- Applications to remove and replace executors (or other personal representatives)
- Claims for financial provision from an estate by someone who has not been left enough to meet their needs
- Claims to clarify a will when its meaning is unclear
- Claims to rectify an obvious mistake in the will's content
- Claims to honour a deceased's promise, where it is not fulfilled in the will
- Disputes about lifetime gifts made by the deceased person
- Claims by or against the estate in respect of debts owed

This is not a complete list. Families are both wealthier and more complex than ever before, meaning the potential for disputes to arise is increasing. Any disagreement about how a loved one's estate is handled can potentially fall under the contentious probate umbrella.

WHAT IS THE PROCESS FOR DEALING WITH TRUST & ESTATES DISPUTES?

There is no single process for dealing with Trust & Estates Disputes. Since each case is different, the process required, and timetable followed, will depend on the nature and facts of the dispute. As a first step, your solicitor will identify whether there is a valid claim, who can bring the claim, and the most effective and proportionate approach for resolving it.

Where possible, we will consider alternative avenues such as mediation to ensure that disputes are resolved quickly and cost-effectively. Some contentious matters, such as claims for rectification and for financial provision under the Inheritance (Provision for Family and Dependants) Act 1975, require an application to the Court within strict deadlines. We will walk you through the process and advise you about the merits and prospects of success, likely costs and timescales so you can make an informed decision about how to proceed.

TRUST AND ESTATE DISPUTES

WHO PAYS TRUST & ESTATES DISPUTES FEES?

There may be different answers to this question depending on the claim. The usual rule is that the loser pays the winner's costs, but there may be exceptions. In some contentious probate claims, costs can be recovered from the estate.

In others, a party to the dispute may have to bear their own legal costs. We will explain your options to you clearly and help you decide on the best approach for your situation.

HOW LONG DO TRUST & ESTATES DISPUTES TAKE?

Again, this will depend on the type of claim. Some claims have strict time limits; for example, if you are claiming that the deceased should have provided for you but did not, you have just six months from the date of the Grant of Probate to bring the claim. If you are claiming the deceased was coerced into making their will, the time limit can be up to twelve years.

Some claims are much simpler to deal with than others. For example, an application to correct an obvious error in a will, like a typo, is going to be dealt with much quicker than an application to enforce a promise the deceased made before they died. Every claim goes through a number of stages which may or may not include court action. Deciding to settle the claim before it reaches court, or choosing to use a type of Alternative Dispute Resolution such as mediation, will likely shorten the process.

EMPLOYMENT LAW FOR EMPLOYEES

CLARIFYING THE SITUATION WITH CLEAR, PRACTICAL ADVICE.

We spend a vast amount of time at work and it is mostly a positive experience. You may need some advice in reviewing a new employment contract and negotiating the terms, asking for a promotion or requesting a flexible working pattern. However, conflicts at work can be distressing and daunting for a variety of reasons and trying to deal with them on your own is difficult. We can help to clarify the situation for you by providing clear, practical and confidential guidance.

Our Employment team works closely with you to decide on your ultimate objective, whether that is remaining in employment (where possible) or negotiating the best terms of departure through a settlement agreement. If all else fails then we can help you pursue your claim through the Employment Tribunals or Courts.

As we have extensive experience in acting for both employers and employees, we see the situation from both perspectives and can anticipate the thought process of your opponent. Due to the stressful nature of employment disputes, we generally encourage an early resolution but when

litigation is required we are robust and tenacious in our approach to get you the best possible outcome.

We advise on all employment related matters including:

- Reviewing your employment contract, service or consultancy agreement
- Employment status
- Flexible working and family related matters
- How to handle a disciplinary matter
- How to lodge and pursue a grievance
- Dealing with a redundancy procedure or reorganisation
- Discrimination, bullying, harassment and victimisation
- Whistleblowing
- Garden leave, post-termination restrictions and fiduciary duties
- TUPE
- Negotiating your exit through a Settlement Agreement or ACAS
- Claims in the ET, EAT and High Court

EMPLOYMENT LAW FOR EMPLOYERS

PRAGMATIC ADVICE TO MOVE YOUR BUSINESS FORWARD.

Your workforce is the essence of your business and needs to be effective. The challenge can come from the fact that employment law is dynamic and rapidly evolving with a constant stream of new rules and regulations. As the employer, you want to be in a good place for recruiting and retaining employees as well as dismissing them fairly should the need arise.

Our Employment team has the expertise and experience to help you navigate and adapt to the changing landscape and provide innovative solutions. We work closely with many types of clients including large companies, SMEs, owner-managed businesses and start-ups across a wide range of sectors providing advice on a variety of

issues, whether they are HR related, strategic, complex or contentious.

We get to know your business, working practices, culture and commercial objectives. This enables us to provide tailored and pragmatic advice to help your organisation move forward and minimise HR headaches and disruption. Where possible we promote the early resolution of employment disputes but, when this cannot be achieved, we guide you through the litigation process with a commitment to delivering the best possible result for your business.

LEGAL SUPPORT FOR ENTREPRENEURS

We provide market-leading advice to entrepreneurs across the business lifecycle, and to protect their personal lives too.

Whether you're in business for philanthropy or profit, one thing is certain: you will face complex tax and legal regulations as you build, scale and operate. And not just related to your business, but also to your personal wealth and interests.

At Collyer Bristow, we believe that all business is personal. That's why we offer a comprehensive set of services, delivered by commercial and private wealth experts, to help you maximise the potential of the business while minimising personal risk, tax and liability.

AREAS OF FOCUS

Our team of vibrant, experienced lawyers provide creative solutions to the business, legal and personal challenges that entrepreneurs face. Our expertise includes the following:

Start-up advice – we provide support with all aspects of setting up a business, from ownership structures to the formal documents you need to ensure that day-to-day decision-making is problem-free.

Governance – we prepare shareholders agreements and governance structures for wealthy families and their businesses.

Commercial contracts and IP - we will help you to protect your assets and commercial interests, making

sure that any contracts you enter into are robust and watertight.

Succession planning – we provide domestic and international succession planning advice, ensuring the wealth you are building is safeguarded for future generations.

Tax – we advise on the most tax-efficient structure for your business and personal asset holdings, both for UK residents and non-residents.

Immigration – we assist entrepreneurs wishing to move to the UK, with a particular focus on entrepreneur, investment and family visas and applications for British nationality.

Residential and commercial property – we assist entrepreneurs with all aspects of their business and residential property needs.

Asset protection – we help protect your business and personal assets against potential challenges or claims on divorce or otherwise, including pre- and post-nuptial agreements.

Exit services – we advise our entrepreneur clients on the sale, acquisition and restructuring of both their business and personal assets.

Our holistic approach means our most entrepreneurial clients can focus on the big opportunities that come with running their own business, safe in the knowledge that their commercial and personal interests are being taken care of by experts.

FAMILY & DIVORCE

GUIDING YOU WITH CLARITY AND EMPATHY.

Relationship breakdown and family problems are never simple and can be extremely challenging, both financially and emotionally. At this distressing time, you need experienced empathetic advisers you can trust to provide clear and practical guidance.

Our Family team invests time in gaining a full understanding of the intricacies of your life and provides advice tailored to your specific needs. We will guide you skilfully and sensitively through complex national and international financial claims and matters involving children, providing you with pragmatic solutions in a clear and understandable way. Our four partners have substantial experience and our team is completely committed to protecting your interests and achieving the best possible outcome for you and your family.

For appropriate cases we have a strong mediation practice which helps separating and

divorcing parents decide on the full range of issues and practical matters with the assistance of one of our lawyers acting as an impartial mediator. We have an excellent track record of bringing about successful mediations through the adoption of a calm and logical approach.

In addition we are very experienced at negotiating Pre-Nuptial and Post-Nuptial Agreements, particularly where more than one jurisdiction is involved.

We advise on:

- Children
- Cohabitation
- Divorce and separation
- Financial provision
- Jurisdictional disputes
- Mediation and Collaborative law
- Pre and post nuptial agreements

**“THE TEAM IS A VERY SAFE
PAIR OF HANDS, COMMERCIAL,
WORKS TIRELESSLY FOR ITS
CLIENT TO ACHIEVE THE BEST
OUTCOME”**

LEGAL 500, LEGAL DIRECTORY



FAMILY OFFICES

CREATING A LEGACY FOR YOU AND YOUR FAMILY.

As the needs of multi-generational and international families evolve, the family office becomes an increasingly important vehicle when it comes to protecting significant wealth whilst fulfilling business and philanthropic aims. Each family office is unique in terms of culture, structure and scope; they reflect the distinct values and interests of the families they are associated with. Due to this diversity, each family office will encounter its own legal, business and personal challenges. It is therefore crucial to work with a team of trusted advisers with the ability to provide you with pragmatic and truly bespoke advice.

With strong expertise in tax and estate planning, wealth structuring and succession planning, our Tax & estate planning team provides single and multi-family offices with guidance on the accumulation, protection and transfer of family wealth to future generations. As the affairs of high net worth families become increasingly complex, often spanning multiple jurisdictions, we ensure your wealth is structured in a way that is tax efficient and fulfils the requirements of you and your family. Our team gains a thorough understanding of your circumstances so we can provide you with carefully tailored solutions which align with your objectives and priorities.

IMMIGRATION

BESPOKE SOLUTIONS FOR HIGH NET WORTH INDIVIDUALS.

In today's world in which people and their business affairs are increasingly international, immigration plays a critical role. However, the legal framework governing global mobility is constantly changing and is becoming an ever more challenging field for individuals and organisations to navigate.

Whether you are a wealthy individual looking to move with your family, an entrepreneur choosing to expand your business, or an established organisation transferring employees from overseas, you need expert legal advisers who can provide creative, strategic guidance to make this process as smooth as possible.

Our Immigration team offers a personal and tailored service to private clients and businesses. We invest time in gaining a full understanding of your unique circumstances and priorities, which allows us to determine the route which best fits your requirements. We can then guide you practically and pragmatically through the immigration process, also advising on any relevant tax planning implications.

For high net worth individuals and their families making the decision to relocate, solutions may involve the Innovator Founder Visa, Global Talent Visa, Student or Working Visas, or an application on the basis of family relationships. If you have already lived in the UK for a time, our team can also advise on applications for permanent residence, indefinite leave to remain and citizenship.

We also provide innovative advice to businesses looking to recruit nationals from abroad or to transfer employees to the UK from an overseas office. This may include obtaining and managing a sponsorship licence for an employer, submitting applications for Skilled Worker Visas or Global Business Mobility Visas for sponsored employees under the points based system, arranging Tier 5 visas for temporary workers (Creative and Sporting) or obtaining a temporary sponsor licence and then a UK Expansion Worker Visa for overseas companies sending their first employee to the UK to grow the business.

INTERNATIONAL TRUSTS, TAX & ESTATE PLANNING

CLARIFYING COMPLEXITY AND PROTECTING YOUR ASSETS.

Wealthy individuals and families with international affairs must give careful consideration to ensure that their assets are protected and passed on to future generations in a way which is effective and efficient in all the relevant jurisdictions. Whether the circumstances involve assets owned in various parts of the world or foreign people living in or moving to the UK, without proactive and strategic planning there is a risk of assets passing in an unintended way or valuable opportunities being missed.

With tax and succession laws becoming increasingly complex, you need a trusted adviser to help you navigate the landscape and structure your wealth in a way that ensures tax efficiency and fulfils the requirements of you and your family. We regularly work with advisers around the world to ensure that advice in different jurisdictions is properly coordinated.

Our team works closely with wealthy international individuals and families to support them in protecting their wealth now and in the future. Our clients' assets can be complex and diverse requiring the deployment of a variety of holding vehicles including trusts, foundations, companies and partnerships.

We offer a truly bespoke service by gaining a complete understanding of your circumstances and priorities. We can then devise uniquely tailored and sophisticated frameworks which manage your wealth effectively, providing the necessary flexibility to respond to changing circumstances. Our team has a reputation for taking a creative approach and we pride ourselves on continually striving to find new and better ways to help our clients manage their wealth.


MEDIA & PRIVACY

PROTECTING YOUR PROFILE.

In today's technologically driven world, private or false information can be disseminated in a matter of seconds with the potential to violate the privacy of you and your family or jeopardise the reputation you have spent a lifetime building. As well as possibly having significant financial repercussions, it can prove to be extremely emotionally distressing. Your reputation is your most valuable asset and must be protected. Whether you need to take swift action to deal with specific damaging information or are looking to proactively review, manage or exploit your reputation on or offline, you should work with a team which can provide you with pragmatic solutions with clarity and sensitivity.

Our Media and Privacy team acts for individuals in high profile careers who may rely on their reputation for work, be they business leaders or personalities in the media spotlight. Our expertise covers all disciplines related to the protection of reputation and privacy including defamation, breach of confidence, data protection, harassment, brand protection and the Right to be Forgotten.

Each and every client and situation is unique so we gain a full understanding of the circumstances and devise a tailored strategy. We understand how upsetting it is when your reputation or privacy is compromised and will work determinedly to gain control of the situation and deliver the best possible result.



**“THE TEAM IS FIRST CLASS,
KNOWLEDGEABLE,
APPROACHABLE AND OFFERS
EXCELLENT VALUE FOR
MONEY”**

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PERSONAL INSOLVENCY

PROFESSIONAL ADVICE FOR COMPLEX AND HIGH-VALUE PERSONAL INSOLVENCY MATTERS

Personal bankruptcy often involves complex and contentious legal issues, especially when it concerns international debtors, creditors, lenders, assets and financial structures. Our partner-led team has the expertise to help you tackle these challenges. We advise the full range of stakeholders including trustees in bankruptcy, debtors and their families, creditors and anyone involved with or exposed to the personal insolvency process.


COMPREHENSIVE PERSONAL BANKRUPTCY SERVICES FOR HIGH-NET WORTH INDIVIDUALS

International bankruptcy experts - We regularly act for both the trustee and the debtor in bankruptcies where the debts run to millions. We have particular expertise advising internationally mobile, high-net-worth individuals, their family

members and companies when, whether due to debt size or liquidity issues, that individual is threatened with bankruptcy proceedings.

Many of the bankruptcies we deal with have a cross-border element and we have significant experience advising on bankruptcies that span multiple jurisdictions. Such cases often involve working with overseas lawyers to preserve and recover international assets, making and defending insolvency proceedings in other jurisdictions, challenges to voluntary arrangements and investigating offshore trusts.

By involving us at an early stage if you find yourself facing financial difficulties, we can help you identify problems and aid meaningful conversations with stakeholders to achieve the best outcome. That could involve a formal insolvency process or other personalised solutions to help you manage your debts and future financial obligations.



**“ONE COULD NOT HAVE ASKED
FOR A MORE EXPEDIENT,
THOROUGH AND
FORESIGHTFUL EXPLORATION
OF THIS PROPERTY’S
POTENTIAL AND LIABILITIES.
I AM TRULY GRATEFUL”**

CLIENT FEEDBACK

PROBATE

A PERSONAL SERVICE WHEN IT IS NEEDED MOST.

In the extremely difficult and upsetting time following the death of a family member or other loved one, there are many things you have to attend to and consider. Dealing with the legalities should be made as straightforward and stress-free as possible. You need the support of an empathetic adviser who can provide you with clear, pragmatic guidance to ensure that the estate is administered correctly, promptly, tax-efficiently and in a way that fulfils the wishes of the deceased.

Our Probate team provides practical, tailored advice to families, executors and beneficiaries on the administration of estates after death. This could involve the transfer of assets to future generations or ensuring a family business

continues running or is passed to a child or spouse. People's lives can be complicated and the estates we deal with are often complex, high value and spanning across multiple jurisdictions.

We advise on business, agricultural and heritage property reliefs from inheritance tax and post-death variations, as well as preparing inheritance tax accounts, obtaining grants of probate and negotiating valuations with HMRC. Our team has significant experience in dealing with cross-border succession issues, working with advisers in other jurisdictions to ensure that estates are administered in a coordinated way, obtaining UK grants for foreign people who died owning UK assets, and re-sealing Commonwealth grants and English grants overseas.

RESIDENTIAL PROPERTY

BESPOKE, PRAGMATIC ADVICE THROUGH EVERY STEP OF THE PROCESS.

Buying or selling property can be an exciting yet stressful experience, particularly in today's turbulent economic climate and unsettled real estate market. By nature, it can also involve very tight deadlines and complex structures. Whether you are purchasing your main residence or widening your property portfolio, the conveyancing process should be made as stress-free as possible by instructing trusted advisers who can offer you high quality, tailored advice.

Our Residential property team delivers an integrated and seamless service, drawing on expertise from across the Real estate practice to provide guidance on any property matter that you, as a private client based in the UK or overseas, may face.

On the residential side we advise on sales and purchases, funding and structuring for

tax efficiency, leasehold enfranchisement, lease extension and residential lettings, with a special focus on prime and super prime London properties and substantial country houses. When it comes to your commercial property assets, we have the expertise to support you with sales and purchases and the full range of landlord and tenant issues.

We understand that each and every client is unique with specific objectives and priorities so we take the time to fully familiarise ourselves with these. We can then take you smoothly through the transaction, pre-empting and navigating any potential pitfalls and providing truly bespoke and pragmatic advice.

TAX DISPUTES & INVESTIGATIONS

GUIDING YOU & YOUR BUSINESS THROUGH DISPUTES WITH HMRC.

Disputes with HMRC can arise for any number of reasons. There may have been a mistake which needs to be remedied; HMRC may want more evidence to substantiate your tax position; or there may be a disagreement over how the law should be applied.

Our team advises wealthy individuals, owner managed businesses and entrepreneurs on dealing with disputes and investigations across all areas of tax. We have the expertise to handle disputes relating to the most complex aspects of personal and corporate tax. These include, for example, the remittance basis of taxation for non-domiciliaries, the taxation of offshore trusts and companies, tax arrangements for companies and individuals, including tax residence and domicile issues. Our team also provides preventative advice so you can mitigate tax risk which may be associated with any proposed or

existing arrangements.

We are committed to achieving the best outcome for you as a client. We gain a full understanding of your circumstances so we can provide solutions tailored to your specific situation.

Using our in-depth knowledge HMRC practice and procedures, we always seek to negotiate a settlement which is cost effective and acceptable for both you and HMRC wherever possible.

Taking a dispute to the Court or Tribunal should almost always be a last resort. However, in those cases where a settlement is either not possible or not desirable, we have the experience, ability and determination to proceed to litigation to protect our clients from attack by HMRC.

UK TRUSTS, TAX & ESTATE PLANNING

CREATING AND PRESERVING YOUR LEGACY.

Considering estate and succession planning during your lifetime gives you the opportunity to structure your affairs in a flexible and tax-efficient way for the short and long term. You may be looking to provide for children or grandchildren without them having control too soon, preserve business assets, or protect a disabled child. To ensure that your wealth is structured in line with your priorities, you need an expert adviser to provide you with creative and individually tailored advice. While the scope for people domiciled in the UK to create new trusts tax-efficiently is more restricted than in the past, there are still a number of planning options.

Our team will guide you through the available tax and succession planning opportunities and provide effective strategies to deal with issues which could impact the transfer of

wealth including marital breakdown, financial immaturity, mental incapacity and providing for disabled beneficiaries.

We support individuals, families and trustees in the establishment and administration of trusts and other estate planning structures. We also advise on the ongoing management of existing trusts, including changes of trustees, restructuring and taxation.

We know that each and every client is unique so we spend time gaining a thorough understanding of your specific circumstances and what is important to you and your family with regards to succession. We will then work with you to manage your estate in a way that is tax-efficient and fulfils your wishes for your family's future.

US/UK TAX ADVICE

UK TAX ESTATE PLANNING ADVICE, WITH A US CONSCIENCE

For individuals with personal and financial connections in both the US and the UK, navigating the interaction between the two regimes on matters of tax, estate planning, trusts and succession can be complex. Individuals may have just avoided the pitfalls of one jurisdiction only to fall foul of the rules in the other.

If you are in the position where you have interests across both sides of the pond, it is crucial that you work with advisors with experience in crafting suitable UK advice that is mindful of, and can coexist tax-efficiently with, concurrent US concerns.

PROFESSIONAL ADVICE ON TRANSATLANTIC TAX AND ESTATE ISSUES

Our Private Wealth team includes lawyers who specialise in providing guidance on a range of US/UK cross border matters. Co-ordinating with US advisers where necessary, we are able to provide a tailored and fully integrated estate plan.

WILLS & SUCCESSION PLANNING

PROTECTING YOUR WISHES BEYOND YOUR LIFETIME.

Creating a will can seem like a daunting prospect, raising questions of mortality which you may prefer not to contemplate. However, it is one of the most significant things you can do to provide for your loved ones beyond your lifetime. Without an up to date and well-drafted will, you are at risk of the distribution of your estate not reflecting your true wishes. Whether your circumstances and wishes are relatively straight forward or more complex, you need a trusted adviser to support you to prepare a tax efficient will and to document precisely how you would like your assets to be managed on death.

Our team has the expertise to guide you through the process of making and updating your will, providing you with advice that is tailored to your unique circumstances. Many of our clients have complicated personal affairs which could include being domiciled abroad, holding assets in multiple jurisdictions or wanting to protect wealth through multiple generations. We gain a holistic understanding of the complexities of your life. This allows us to provide you with the certainty that your plans have been set out exactly as you would wish.

**MORE
ABOUT
COLLYER
BRISTOW**

INTERNATIONAL

Collyer Bristow is a highly internationally focused firm. We work with clients based in countries all over the world. However, as a firm we maintain a particular focus upon; have a cultural awareness and language expertise in; and have built considerable professional contacts in Italy, USA, Channel Islands, and Switzerland.

Our Swiss office enables us to service our corporate and high-net-worth private clients in the region and maintain valuable links with local advisers.

We are an active member of World Link for Law, a leading network of international law firms which allows us to source and collaborate with high quality international legal providers in the jurisdictions that our clients require.

CORPORATE SOCIAL RESPONSIBILITY

As a firm, we believe that we have a clear obligation and responsibility to serve the wider community's needs. By doing so we fulfil the core values of our organisation and offer staff a sense of involvement and engagement with the community.

Each year we support Charity of the Year, voted on by the firm, through volunteering, participating in challenge events and fundraising within the office.

We have established a professional network called Higher which elevates women and champions equality in the workplace. A number of our lawyers provide free legal advice to members of the community who would otherwise be without legal assistance through local law centres, evening clinics and the Citizens Advice Bureau.

DIVERSITY AND INCLUSION

We place great value on all of our employees. We celebrate diversity and respect the unique and distinctive qualities of our colleagues. We strongly believe that everyone has the right to enjoy an inclusive working environment which encourages professional and personal development free from discrimination or harassment. Our Diversity and Inclusion policy details the firm's approach to equal opportunities and covers discrimination, harassment/bullying and victimisation.

FOR MORE INFORMATION PLEASE CONTACT



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