

Family Office Services

Larger clients increasingly manage their wealth through family offices, to meet their need for financial and professional services in a coordinated and cost efficient way. Where required, we participate in the core wealth structuring function of the family office, working with the client's accountant, private banker and agent/commercial director, together to fulfil the role of the "trusted adviser". There is no one model for the family office – flexibility is key if that core team of advisers is to operate effectively and within budget.

With our network of contacts with lawyers and other professionals in all the major jurisdictions, we are able to provide a global service.

On occasion, we are asked to replicate the family office function within Burges Salmon, either providing the services ourselves, or coordinating the subcontracting of projects to suitable specialists.

In other instances, our involvement is more limited, providing advice only on particular issues or transactions to the family office. We recognise that it is often appropriate for different needs to be met by different law firms.

Our charges are based on hourly rates but we are willing to discuss other fee structures such as fixed or capped rates.

Services to family offices include:

Tax Planning, Trusts and Wealth Structuring

- Tax planning strategies to save inheritance tax, capital gains tax, income tax, VAT and SDLT
- Non-domiciliary tax planning
- UK and cross-border succession planning
- Advice on the use of trusts, partnerships, LLPs and companies in wealth structuring, including family limited partnerships
- Drafting family charters
- Philanthropy

- Tax advice on all property transactions
- Structures for holding art collections, including heritage property.

Succession

- Dealing with the administration of UK property held by clients domiciled in other jurisdictions
- Liaison with foreign lawyers, to administer non UK property held by UK domiciled clients

Family

- Financial settlements on marriage breakdown
- Re-structuring of family businesses on separation
- Arrangements for children
- Pre and post-marital contracts
- Advice to civil partners and unmarried couples.

Tax compliance and controversy work

- Tax Tribunal work
- Advice on disclosure of tax schemes
- Professional negligence actions
- HMRC investigations and enquiries

Litigation

- Contentious probate and trust litigation, onshore and offshore
- Variation of trusts
- Property and partnership disputes
- Commercial disputes

Property

- Advice on residential, commercial and agricultural transactions and lettings
- Realisation of development value, through sales, options and joint ventures

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Burges Salmon LLP is a Limited Liability Partnership registered in England and Wales (LLP number OC307212) and is regulated by the Solicitors Regulation Authority. A list of members, all of whom are solicitors, may be inspected at our registered office: One Glass Wharf, Bristol BS2 0ZX.

There are also specialist units that advise on:

- Buying foreign property
- Charities and social enterprise
- Executive remuneration
- Employment
- Intellectual property
- Corporate issues

For further information, please contact any of our team



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