BARKER GOTELEE

SOLICITORS

PRIVATE CLIENT

Our team of specialists has extensive experience and we are known for providing a **reliably expert, prompt and professional service**.

We provide **proactive, sensitive** advice on all legal issues affecting an individual's or a couple's personal and financial affairs, whether in planning for the future or dealing with an unexpected event. Where appropriate we liaise with our colleagues in other departments to provide **clear advice** and **practical solutions**.

We advise clients regularly in relation to the following.

- Preparation of **Wills**.
- **Probate** and the administration of someone's estate after they have died.
- Strategies to save **Inheritance Tax**, including Agricultural Property Relief and Business Property Relief.
- **Deeds of Variation** and **Claims for the Transferable Nil-Rate Allowance**.
- Succession and tax planning for **Business Owners**, including **Cross-Option Agreements**.
- Succession and tax planning for **Farmers** and in connection with **Landed Estates**. (*Please ask for our separate profile.*)
- Creation, taxation, administration and winding up of **Trusts**.
- Protecting **Pension and Life Insurance** death benefits from inheritance tax.
- Asset protection particularly in relation to **Care Fees Planning** and **Bankruptcy**.
- Issues particular to **The Elderly**, such as the management of their affairs, state benefits and care home contracts. (*Please ask for our separate profile.*)
- The preparation and registration of **Powers of Attorney**.
- **Deputyship applications** and the management of a Patient's affairs.
- **Contentious Trusts and Probate** – disputes involving executors, administrators, beneficiaries, trustees, attorneys and/or court appointed deputies, including professional negligence claims. (*Please ask for our separate profile.*)
- Bringing and defending **Inheritance Act Claims**.
- **Joint Property Ownership** and declarations of trust.
- Legal issues arising on **Intergenerational Cohabitation**, where two adult generations move in together.
- **Pre-Owned Assets** income tax charge.
- Establishment and administration of **Charities.**

In relation to all the above, there may be issues of **international taxes, laws or practice** to consider. It may be that you are looking to emigrate, you may already own property or investments overseas, a beneficiary lives abroad, or you may be non-UK domiciled or non-resident in the UK. We will co-ordinate advice with overseas professionals to provide tax efficient, suitable solutions.

For further information or advice contact:

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