

Alison Broadberry

Managing Partner

Head of Private Client



Alison became the Managing Partner of Edwin Coe in April 2023 having joined as Head of Private Client in 2016.

As Managing Partner, Alison is responsible for the strategic planning and development of our business, with a strong focus on our purpose, our people and our profit to ensure we meet our objectives and operate as a force for good.

As Head of Private Client, she is responsible for ensuring that the Private Client team provides an outstanding quality of advice and service to all their clients. She is very passionate about their team ethos and seeks to ensure they are a close-knit team who work collaboratively with each other and the wider firm.

In her private client practice, Alison advises high-net-worth UK and non-UK domiciled clients on a wide range of tax, trust, estate planning and succession matters. She advises individuals, families, executors, trustees and beneficiaries on how best to hold, protect and pass on business interests, real estate, investments and other wealth to the family and wider beneficiaries. She has a strong focus on advising her clients proactively to protect their assets (whether during lifetime, held outright, in trust, partnership, company, or in an estate) from the many possible risks and threats that exist. These include: actual or potential disputes, divorce or other claims against beneficiaries, financially vulnerable or immature heirs, guarding against “too much, too soon”; and unnecessary taxation. Alison and her team provide clear and practical advice to meet their clients’ objectives in the most suitable way for them.

She has particular experience of advising business owners on pre-sale estate planning and dovetailing the personal and business advice, working alongside her clients’ existing professional advisors or with her Edwin Coe colleagues. Alison also has particular experience of advising on the interaction of her clients’ estate planning with their financial planning, working alongside her clients’ financial, investment or wealth planning professionals.

Experience

Alison’s experience includes:

- Advising on implementing practical estate plans to reduce inheritance tax and preserve wealth for individuals, couples and families; and ensuring that their wealth is preserved to support the surviving heirs and successive generations.
- Implementing sensitive, practical and tax efficient estate planning for families where there are children or other heirs from more than one marriage or prior relationship; balancing the needs of the surviving spouse and all the children, minimising the risk of future conflict.
- Advising clients owning and acquiring properties (in particular to assist their children on to the property ladder or those wishing to hold “buy to let” properties) on opportunities to save tax and protect the value from non-tax threats.
- Advising high net worth clients on creating family trusts and family investment vehicles.

- Ensuring assets will pass under tax-efficient and wealth protecting Wills and dovetailing this planning with asset protection trusts for life policies and pensions.
- Advising business owners on maximising the availability of entrepreneurs' relief for capital gains tax and business property relief for inheritance tax; dovetailing personal and business succession planning including advising on business protection strategies often involving the use of life assurance and trusts.

Expertise

- [Private Client: Overview](#)
- [Wills and Lasting Power of Attorney](#)
- [Tax](#)
- [Estate and Inheritance Tax Planning](#)
- [Trust Planning and Succession Planning](#)
- [Wealth Preservation](#)

Credentials

- Recommended in The Legal 500 UK 2024 for Personal tax, trusts and probate and Charities and not-for-profit
- Ranked as a 'Leading Individual' for Private Wealth Law in Chambers High Net Worth since 2018
- Listed by eprivateclient as one of the 50 Most Influential Private Client advisers in the UK for 2023, 2021, 2020, 2019, 2018, and 2017
- winner of the Citywealth Powerwomen Awards 2024
- Recommended in Citywealth Leaders List since 2015
- Silver award winner in the Inspirational Woman of the Year category at the Citywealth Powerwomen Awards 2018
- Member of The Society of Trust and Estate Practitioners (STEP)
- Member of the Law Society
- Member of The Association of Taxation Technicians
- Previous co-editor of Houseman, The Law of Life Assurance
- Previous member of ABI Product Tax Panel

Contact

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