David Goepel

Head of Private Client International

Private Client

David joined the Private Client department of Edwin Coe as a partner in January 2009 from Withers LLP, where he qualified as a solicitor in 2000. He acts for a wide range of private clients, including high net worth and ultra high net worth individuals and trustees and deals with a broad range of private client trust and tax work, both onshore and offshore. Much of David's time is spent in advising private clients on cross-border issues, including the co-ordination of advice in a number of different jurisdictions.

Wills and Estate Planning

- Advising a Malaysian couple on co-ordinating their Wills and Estate Planning to cover assets in a number of jurisdictions including the UK;
- Advising a number of Indian and Singaporean clients on domicile issues affecting their estate planning and ensuring that their estate plans are tailored to maximise tax efficiency and asset protection;
- Advising international families on numerous cross-border estate planning issues involving the coordination of advice across multiple jurisdictions, including the United States;
- Advising a successful international couple on a comprehensive estate plan to take account of their assets in a number of different jurisdictions, and to protect the assets from claims on divorce at the level of the next generation.

Trusts and Tax

- Advising a Malaysian client on trust and compliance issues in relation to their holdings of UK residential properties;
- Advising an Asian property investor on the establishment of a Private Trust Company structure;
- Advising an international ultra high net worth family on the funding and management of multiple family trusts to support beneficiaries in a number of different European jurisdictions;
- Advising a prominent Asian businessman on the establishment of complex trust structures including for the holding of a significant international business through a private trust company structure;
- Advising international clients on the best way of structuring the ownership of high-value UK residential property, taking account of the recent tax changes affecting this area;
- Advising an international family on the establishment and ongoing administration of a significant trust involving complex UK and US tax issues.

David is particularly interested in the field of charities and philanthropy. He has advised a number of UK charities both national and local on a variety of legal issues, including the powers and duties of charity trustees, tax issues affecting charities and dealings with the Charity Commission and other regulators. David also has extensive experience of advising charitable donors, often in a cross-border context, in establishing and registering family charitable foundations and facilitating cross-border charitable gifts tax efficiently. He also works with colleagues in other practice areas across the firm to meet the full range of legal services which charities require.

David has lectured and written on a diverse range of legal topics affecting charities, including the changes introduced by the Charities Act 2006, the impact of the substantial donor rules on charity fundraising, the uses of US/UK dual qualified charities in cross-border planning, and developments in the European context in facilitating international charitable giving.

Charities

- Advising on the structuring and establishment of a major pan-African educational charity

Expertise

- Private Client: Overview
- Family and owner run businesses
- Tax planning
- Wills and trusts
- Philanthropy: Overview

Credentials

- Recommended as a ‘leading individual’ in The Legal 500 UK 2024
- Ranked as a Leading Individual for Private Wealth Law in the Chambers High Net Worth since 2018
- Ranked as a ‘Leading Individual’ for Charities in Chambers UK 2021
- Recommended in Citywealth leaders list since 2015
- Member of the Society of Trust and Estate Practitioners
- Member of the Charity Law Association
- Member of the Law Society
- Joint editor of the Charities chapter in Tottel’s “Revenue Law – Principles and Practice”
- Contributed to “McCutcheon on Inheritance Tax”
- Member of the Editorial Board of “The Journal of International Tax, Trust and Corporate Planning”

Contact

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