

## Denise Li Gates

### Senior Associate

### Private Client



Denise joined the Private Client team at Edwin Coe LLP in January 2023, after having trained and worked at Charles Russell Speechlys LLP for over ten years. Denise advises both UK-based and international individuals to ensure their wealth planning and succession objectives are met tax-efficiently.

Denise undertakes a broad range of tax and succession planning, varying from maximising available reliefs and implementing or simplifying asset-holding structures, to preparing sophisticated wills and preparing for mental incapacity.

#### Examples of Denise's work includes:

- Advised on the utilisation and restructuring of will trusts following the deaths of a couple in quick succession, resulting in a substantial tax saving;
- Advised a branch of a "super wealthy" family on the winding up of an offshore trust including negotiations and navigating a complex family dynamic;
- Worked with offshore lawyers to ensure a coherent estate plan for a wealthy UK-based foreign national from the perspective of both relevant jurisdictions;
- Advised a divorcee on the tax consequences of the agreed financial split and secured a lesser-known tax exemption;
- Advised an entrepreneurial family ahead of a sale of their company including the establishment of a family trust.

## Experience

## Expertise

- [Private Client: Overview](#)
- [Estate and Inheritance Tax Planning](#)
- [Family Business](#)
- [Tax](#)
- [Trust Planning and Succession Planning](#)
- [Vulnerable and Elderly Clients](#)

- [Wills and Lasting Power of Attorney](#)

## Credentials

- Ranked as a Top 35 Under 35 (eprivateclient 2020)

## Contact

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