EdwinCoe LLP

Private Client

Our leading Private Client team assists private individuals and families for whom wealth preservation is a fundamental objective.

We act as trusted advisers to individuals, families, trusts and family or owner-run businesses both in the United Kingdom and internationally. We offer continuity and foster close long-term relationships with clients in order to provide sound advice on the various situations that can arise in life, both legal and fiscal, in personal as well as business situations. Confidential and discreet handling of such matters is an essential part of what we offer.

Our areas of expertise include the following:

- **Estate planning (Wills and Lasting Powers of Attorney)**
- **Wealth preservation**
- **Tax planning**
- **Inter-generational succession issues**
- **Probate of estates, incl. cross-border estates**
- **Intestacy**
- **Philanthropic planning**
- **Elderly and vulnerable clients**
- **Family settlements**
- **Family governance structures**
- **Lifetime tax planning**
- **Establishing onshore and offshore trusts**
- **Trust management**.

Trusts and Tax

We specialise in trust and tax advice and work closely with our clients' wealth management professionals, trust companies and trustees in order to assist clients in the UK and based all over the world. Our client base is increasingly international and we regularly advise on cross-border issues relating to trusts and estates, ensuring multi-jurisdictional advice is co-ordinated seamlessly.

We work particularly closely with Edwin Coe's in-house team of specialist Chartered Tax Advisers to provide a seamless specialist service covering all areas of personal and private wealth taxation.

This collaboration provides a unique combination of multi-disciplinary perspectives covering the full range of legal and tax advice needed by private clients.

Wills and Estate Planning

We pride ourselves on providing bespoke guidance and practical advice on the most tax-efficient and flexible wills to meet clients' estate planning aims. We are experts in dealing with complex will planning involving international issues and we also advise on Lasting Powers of Attorney which allow attorneys to act on behalf of clients should they lose mental capacity in the future.

Philanthropy

We specialise in advising charitable donors, often in a cross-border context, in establishing and registering family charitable foundations and facilitating cross-border charitable gifts tax efficiently.

Pensions and Tax Planning

The way in which pension benefits can be used has changed very dramatically since 5 April 2015. Although the tax treatment varies depending on whether a person dies before the age of 75 or afterwards, the benefits which can accrue to heirs is significant. The way in which pension benefits should be used will depend on personal circumstances and Edwin Coe is well placed to advise in this area, in conjunction with our clients' financial advisers.

Probate and Intestacy

Our range of Private Client expertise includes acting as or representing the executors or administrators in the UK or often complex and multi-jurisdictional estates, and advising on which countries' succession rules apply to the estate, particularly where forced heirship rules are relevant. We have extensive experience in applying for the resealing of foreign Grants of Probate, applying for limited grants and handling intestacy cases. We provide a seamless service when administering estates whilst complying with all the relevant tax and legal requirements and above all, aim to provide the bereaved family/friends with a sensitive, client-focused service.

Court of Protection

We also act for clients who have lost the capacity to deal with their own financial or personal affairs including obtaining Court of Protection Deputyship Orders where necessary. These allow a next of kin or close professional contact to take responsibility for the clients' affairs.

'Very helpful team that is always pleasant to work with. The team is at the top in terms of competency. Good technical knowledge but able to be practical with clients.'
Legal 500 2020

'A lovely firm to deal with, being big enough to have depth in knowledge and experience but small enough to have that real personal touch.'
Chambers High Net Worth 2019

edwincoe.com

'They're a one-stop shop for problems that we have so that whatever problem we have can be tackled.'

Chambers High Net Worth 2018

'They're articulate, they give good advice, they're very caring, very efficient and they certainly know their job.'

Chambers High Net Worth 2018

Team Recognition

"Edwin Coe LLP has a diverse practice. Its experience includes £1bn restructurings, and large probates." Legal 500

Client service: *"With so many years' experience in dealing with complex estates, the team has fine-tuned its procedures and communication skills with clients, beneficiaries and other agencies. We find them highly efficient and approachable in every area."* Chambers & Partners

"Alison is dedicated to giving her clients a first class service. She has an excellent and unusually in-depth all round knowledge of legal, technical and practical matters affecting private clients." Leaders List

"Alison has good flexibility and is good at getting clients to discuss what they need openly, and she combines that with being really technically knowledgeable and having very up-to-date knowledge." Chambers High-Net-Worth

Previous head of team Nick Giles attracts praise for his representation of wealthy families and family-owned businesses. He is an expert in the administration of intestate estates.

"Nick Giles advice is always invaluable. I could not recommend him highly enough." Chambers & Partners

"David Goepel is one of the most a ble practitioners in the sector, but operates exactly where his clients want to be - under the radar. He has a remarkable ability to build consensus and drive forward solutions, where others would fail.." Legal 500

"David Goepel is making waves in the market, with a robust practice in both private client and charities matters. Sources praise his affable approach, saying: He brings a sense of calm and order to legally complex matters, which are often very emotionally intense for the client." Chambers & Partners

Examples of our work

- Acting for a high-net-worth family in establishing a family governance structure including a family company, charitable foundation and a number of family trusts.
- Comprehensive estate and trust planning for a successful family including philanthropic planning for the future.
- Administering the complex estate of a high-profile international individual including complex on-going will trusts.
- Advising a successful entrepreneur on trust and tax planning issues prior to arrival in the UK.

Contact us

For further information please call Alison Broadberry or email a team member: firstname.surname@edwincoe.com. For individual profiles please visit our website: www.edwincoe.com

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