

# HEWITSONS

## PRIVATE WEALTH SERVICES



At Hewitsons, we offer a comprehensive range of legal services through specialist teams across our four offices. Our guiding principle is Absolute Client Focus and this underpins everything we do. Our overriding focus is you, the client, and what you want to achieve. Our aim is to provide outstanding client service by working with you, to understand and achieve your aims as efficiently and cost-effectively as possible. This focus and the depth of our technical skills results in consistently high rankings in the independent legal directories, Legal 500 and Chambers.

Our highly experienced, specialist Private Wealth Team advises individuals and Trustees on a wide range of matters including:

- Wills and Inheritance Tax
- Tax Planning
- Succession Planning (eg for family businesses)
- Lifetime gifts
- Heritage Property
- Lasting Powers of Attorney
- Enduring Powers of Attorney
- Court of Protection applications, including Deputyships and Statutory Wills
- International aspects (residency, domicile, assets abroad)
- Estate Administration (sometimes referred to as Probate)
- Deeds of Variation (to redirect assets following a death)
- Trust creation
- Trust administration
- Personal tax

- Disputes in relation to Wills and estates
- Financial abuse claims
- Challenging NHS Continuing Healthcare Funding decisions

We combine our expertise, experience and professionalism with a straightforward, friendly and practical approach in dealing with personal and often sensitive matters on your behalf.

We recognise the importance of preserving assets for the benefit of future generations and the challenges of balancing the interests of different family members. By taking time to gain an in-depth understanding of you and your circumstances, we strive to build a relationship of mutual trust and one from which we are well placed to provide best advice.

Our Private Wealth Team encompasses our Trusts and Tax Team which deals with all aspects of the administration of Trusts and assists with the tax and accounting aspects of estates. The Trusts and Tax Team also provides a personal tax service to individuals which includes the preparation of annual tax returns.



Also part of the Private Wealth Team, our Contentious Trusts and Probate Team are able to advise on any contentious aspects which may arise, including disputes in relation to Wills, estates and powers of attorney; financial abuse claims and challenges to long-term care funding.

By working closely with our colleagues in other Teams, we ensure clients benefit from our full range of services.

Our other service areas are:

- Agriculture and Rural Property
- Commercial
- Construction and Engineering
- Corporate
- Dispute Resolution and Litigation
- Employment
- Insolvency and Corporate Recovery
- Intellectual Property and Information Technology

- Pensions
- Planning and Environmental
- Real Estate
- Residential Property

The Private Wealth Team sends out a monthly newsletter by email with various topical updates on Private Wealth-related matters. If you would like to receive this, please contact [marketing@hewitsons.com](mailto:marketing@hewitsons.com)

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We pride ourselves on delivering an outstanding service to a wide range of individuals, businesses and institutions including charities, educational and sports bodies. The firm's size and breadth of specialisms means each client receives the focus it requires. We operate UK wide and have worldwide reach via our network of independent law firms, LawExchange International.

This document is written as an outline guide only and any action should not be based solely on the information given here. Appropriate professional advice should always be taken in specific instances.

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