



### Managing Associate

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**As a managing associate in the private wealth team, I specialise in tax, estate, trust and succession planning for UK and international individuals and families.**

I specialise in tax, estate, trust and succession planning for UK and international individuals and families. I also support a number of high net worth clients in the set up and ongoing governance of grant-making charities.

Every day is different. I get great satisfaction in solving problems by offering solutions in the most practical and commercial way I can.

### Areas of expertise:

- Inheritance and succession planning
- Tax planning (inheritance tax and capital gains tax)
- Preparation of wills
- Trusts
- Court of Protection
- Powers of attorney
- Advance decisions/living wills
- Cohabitation agreements

### Qualifications and memberships

- Admitted as a solicitor in July 2003
- Society of Trusts and Estate Practitioners (STEP)
- Member of the Charity Law Association
- STEP Advanced Certificate in Family Business Advising



If I'm unavailable, please contact:

## Jackie Farrington

Legal Secretary

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