



### Trust Manager (Senior Associate)

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**I am a trust manager in the private wealth team dealing with all aspects of the trust administration including trust accounting and trust taxation.**

With over 20 years' experience within the private wealth team, my role includes liaising with trustees, beneficiaries and professional advisers on a range of issues affecting the day to day administration of trusts.

Building trusting relationships with clients and advisers is important when dealing with financial matters, and I take my time to get to know our clients and their families.

### Areas of expertise:

- Trust accounting
- Trust administration
- Trust taxation (income tax, capital gains tax and inheritance tax)
- Trust tax compliance
- Charitable trust accounting
- Charitable trust compliance and administration

### Qualifications and memberships

- STEP Foundation Certificate for England & Wales (2005)
- STEP Diploma in Trusts and Estates for England and Wales (2009)
- Society of Trust and Estate Practitioners

If I'm unavailable, please contact:



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