



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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