

## Private Wealth

Druces' Private Wealth team offers a comprehensive service to private clients covering UK and international capital taxes, estate planning and probate. We also provide international advisory services for non-UK domiciled clients, both resident and non-resident in the UK, and their trustees, structures and businesses. The team offers structuring advice in relation to worldwide tax optimisation and asset protection. Our experienced Contentious Probate Group deals with disputed wills, trusts and other contentious issues. Our Charities Group guides clients through the range of legal, regulatory and practical issues affecting the sector.

### Our services

- Capacity and Court of Protection matters
- Contentious Probate and Trusts
- Estate Planning
- Real Estate - Syndicated Property Investment, Tax and Residential
- International Wealth & Fiduciary
- Powers of Attorney
- Probate and Estate Administration
- Taxation issues, compliance and disclosure
- Trust administration and Wills

### Key information about us:

- Established in 1767
- Office in the City of London
- International networks
- Partner-led services
- Leading private wealth team
- Corporate & Commercial specialists
- Heavyweight property team
- Experienced commercial litigators

### Types of business/individuals

- Resident and non-residents in the UK
- Non-UK domiciled individuals
- Fiduciaries
- Families
- Charities
- Trustees
- High-net-worth individuals
- Entrepreneurs
- Private Investors

### Key Contacts



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## Our experience

### Succession Planning

- Estate planning for non-UK domiciled families, involving multi-jurisdictional considerations and a diverse assets. Druces has built up a specialism advising on cases involving art.
- Tax planning – advising on leaving multi-million-pound SIPPs to beneficiaries.

### Probate/Estate Administration

- Advising on the re-organisation of an estate with two related trusts to secure a substantial saving of Inheritance tax, using reduced rate of tax on deaths where 10% goes to charity.
- Advising clients on deeds of variations and disclaimers and providing them with options to prevent further inheritance tax and capital gains tax liabilities.

### Contentious Trust and Probate

- Advising executors and beneficiaries in contested probate matters. Including advice to beneficiaries regarding their late mother's estate which comprised of large real estate holdings.
- Application for removal of an executor from office, including mediation.

### International Wealth & Fiduciary

- Acting for family offices, trustees, private banks, companies and individuals on wealth preservation.

- Facilitated the disclosure and forensic investigation of an individual's tax affairs following an enquiry from the HMRC Serious Fraud Office arising from the Panama Papers.

### Charities

- We act for more than 50 leading charities, including household names across sectors including medical, religious and educational.
- Charity formation and administration, tax advice, charity compliance and governance.

### Mental Capacity

- Preparation and registration of Powers of Attorney and advice to attorneys.
- Advising on Court of Protection applications for deputyship orders, statutory wills and gifts. Acting as a professional deputy for property and financial affairs.

### Property

- Advising investors on acquisition and leasing of UK commercial buildings, including the management of operational headquarters for HNW individuals.
- We pioneered property investment via syndication over 30 years ago, acting on the first ever REIT conversion to be listed on the Channel Islands Stock Exchange.

## Key Contacts



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