

B BLICK
R ROTHENBERG

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GROUP company



Integrated trust management

Independent advice to effectively manage the interests of the client



Our client is a group of trusts incorporating a stately home, 30 rental cottages and 750 acres of farmland, as well as other smaller assets.

The beneficiaries are the fourth generation of wealth and comprise two intergenerational family members. There are three trustees.

The challenge

The family needed a trust and accountancy adviser to provide independent advice and effectively manage their interests. They wanted to have transparency over their financial position and make sure that their trusts were structured as efficiently as possible to maximise their value in the future.

How did Blick Rothenberg help?

From a reporting perspective, we complete the trust accounts and annual tax returns ensuring compliance with relevant tax legislation. We also offer advice on tax structuring meaning that the trusts are organised in as tax-efficient manner as possible.

We look at the personal circumstances of each beneficiary to make sure that our advice is suitable across generations. This requires a level of sensitivity and the ability to relate to each of the stakeholders to gain their confidence. In addition to ad hoc communications, we hold formal half yearly meetings with the beneficiaries to discuss the status of the trusts and understand their wishes going forward. It is then our responsibility to present these wishes to the trustees and assist the trustees with any relevant implementation.

The outcome

Our client benefits from efficiently run trusts and complete transparency over their financial position. They also have the security that their affairs are independently and expertly managed by a firm that has their interests at the centre of the work that we do.



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Caroline Le Jeune

Partner
Private Client

I +44 (0)20 7544 8986
E caroline.lejeune@blickrothenberg.com



Trevor Harris

Director
Trusts & Estates

I +44 (0)20 7544 8863
E trevor.harris@blickrothenberg.com



a CogitalGroup company

16 Great Queen Street
Covent Garden
London WC2B 5AH

I +44 (0)20 7486 0111
E email@blickrothenberg.com
W blickrothenberg.com

