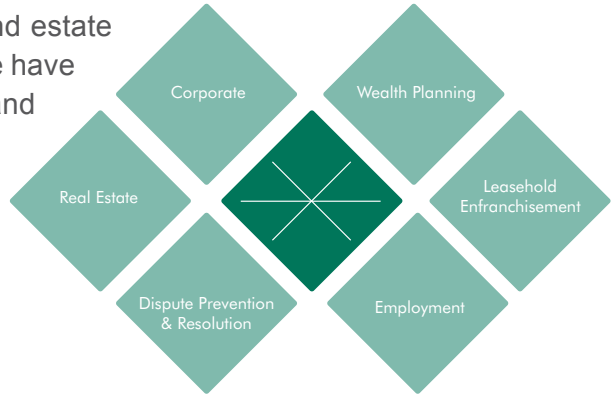
ROOKS RIDER
SOLICITORS

WEALTH PLANNING

As a boutique Central London firm specialising in the fields of domestic and international tax and estate planning, we have a notable depth of knowledge which is often not found in many larger firms. We have a global reach extending across many jurisdictions and extensive knowledge of offshore and onshore trust arrangements.



Our Wealth Planning team acts for a wide range of UK and overseas individuals, trustees, families, their family offices, those in the private wealth industry who advise them and owner-managed businesses looking for advice on both domestic and offshore matters.

Our key areas of expertise are as follows:

- **Tax advice, including**
  - Income Tax
  - Capital Gains Tax
  - Inheritance Tax
  - Stamp Duty and Stamp Duty Land Tax
  - Annual Tax on Enveloped Dwellings
- **Offshore Expertise**
  - Advising on domicile and residence
  - Cross-border Wills, tax and succession planning
  - Advice on the UK Statutory Residency Test
  - Advice on investing in the UK
  - Immigration and pre-immigration planning
  - Trusts and offshore corporations – set up and management
  - General tax and trusts advice
  - Advising offshore trustees on their duties in respect of UK tax
  - Advising clients on making disclosures to HM Revenue & Customs, with a particular emphasis on the Liechtenstein, Jersey, Guernsey and Isle of Man Disclosure Facilities
  - Advising on appropriate ownership structures for UK Property; both residential and commercial
  - Emigration Planning
- **Onshore Expertise**
  - Will drafting
  - Probate & Estate administration
  - Post-death tax planning
  - Lasting Powers of Attorney (preparation and registration)
  - Registration of Enduring Powers of Attorney
  - Care of the elderly
  - Trust and estate disputes
  - Trust creation and general management
  - Court of Protection applications
  - Advice on property ownership and management

There is a continuing need for good practical legal advice for families and their professional advisers in the creation and preservation of wealth. Our team's wide experience over many years of practice will guide you through the ever-changing complexity of current taxation rules, providing related legal advice tailored to reflect your practical needs. We are happy to talk by telephone, or at an initial meeting, to understand your query and see how we can help without substantial commitment.

For further information about our services and how we can help you to achieve your objectives please contact any of the following:

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