Private Lives

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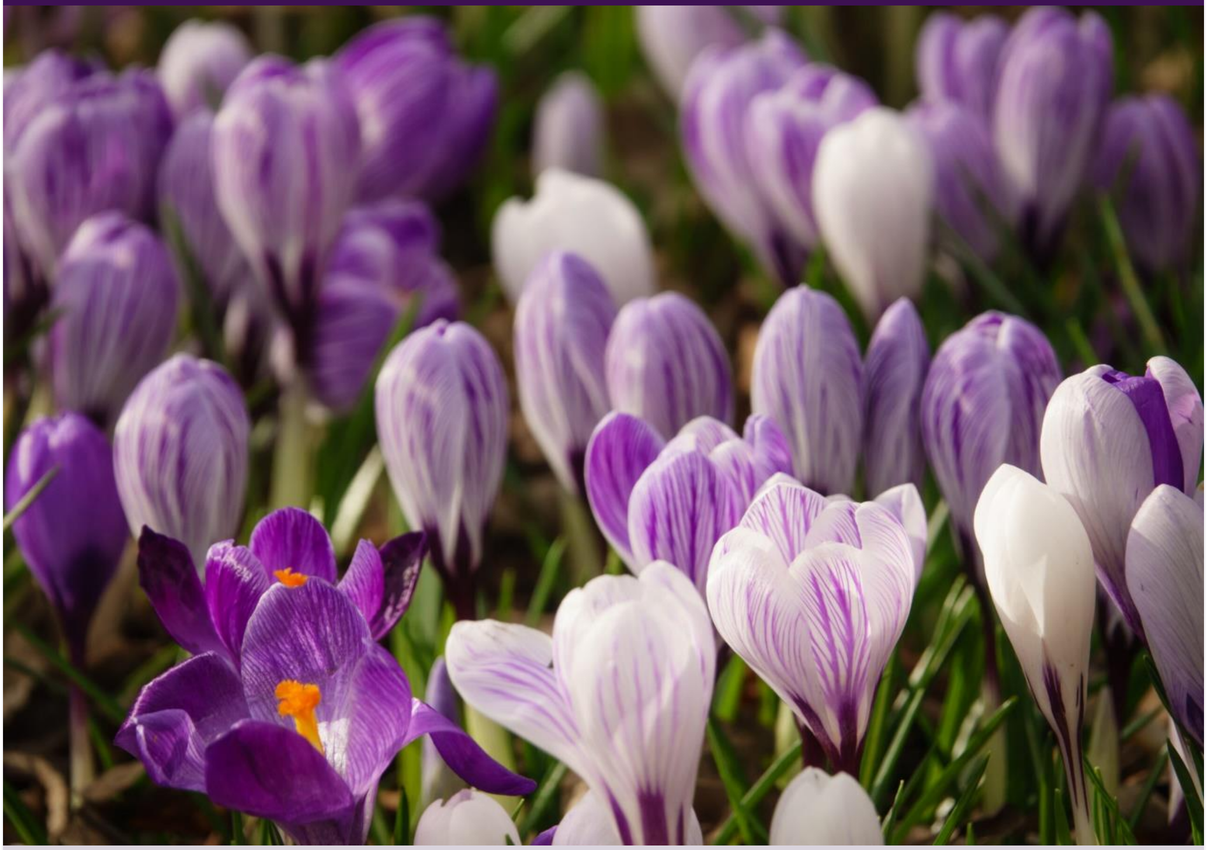
Next Level Law



June 2024 Private Client Advisory newsletter

Welcome to the Spring 2024 edition of Private Lives.

In this extended edition of the newsletter we're pleased to share with you key updates and news from our sector that may affect you.

This spring's newsletter covers a range of topics that we hope you find informative, and as always please do not hesitate to get in contact if you have any questions, comments or need assistance on any of the topics discussed.

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Featured articles

What to do when someone dies: step by step

Katherine Forster provides a guide on some of the important steps that you may need to take when a loved one passes away.

Read more →

Planning for the cost of care fees

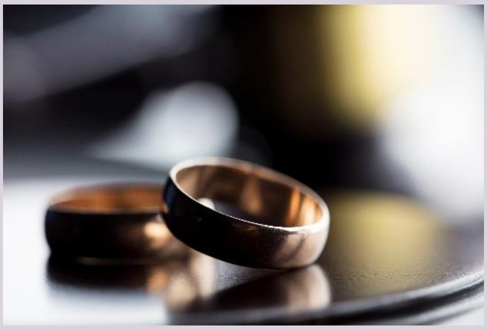
Ava Graves discusses what options are available when lifetime planning, including the benefits and drawbacks of putting your assets into a trust.

Read more →

Trusts in divorce proceedings

Tobias Gleed-Owen and Jennifer Headon explain in what circumstances trust assets can be taken into account in financial remedy proceedings arising upon divorce.

Read more →



The tendency of human nature to be swayed by self-interest rather than by duty

Katherine Forster comments on a recent Court of Protection case highlighting the possibility of a conflict of interest even when steps have been made to avoid it.

Read more →

Ten important questions about Wills you should know the answers to

We spoke with Katie Gibson-Green on our recent Levelling With podcast episode all about Wills. We asked why you should have a Will, when you should get one, what should be included, and much more.

Read more →

Loans for inheritance tax and ‘grants on credit’

Kathryn Ayrdon's explains the Government's decision to remove the requirement for personal representatives (‘PRs’) to prove that they have sought commercial inheritance tax (IHT) loans before they can apply for a ‘grant on credit’.

Read more →

Essential tax planning before the sale of a business

Katherine Forster and Deborah Carrivick discuss the options surrounding tax planning when considering the sale of a business.

Read more →

Capital Gains Tax on divorce – worrying gaps in the new rules for deferred sale arrangements

Tobias Gleed-Owen highlights at least two unprincipled gaps in the new tax reliefs which may leave unwary clients with unexpected CGT charges.

Read more →

Don’t break the neck of the golden goose – carrying on the family farm business legacy

Ava Graves discusses her top tips for successfully carrying on a family farm business legacy.

Read more →

Catering for children from previous relationships within your Will

Georgia Robertson shares why it is important to consider the provisions of your Will carefully in regard to children from previous marriages.

Read more →

Creating a family charter for unchartered family business success

Katherine Forster shares her thoughts on why creating a family charter can be pivotal in the success of a family business.

Read more →

News

Paul Thompson joins Birketts' Private Client Advisory Team

We are pleased to announce the arrival of Paul Thompson as a Partner in the team.

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Michael Rowland joins Birketts' Private Client Advisory Team

We are pleased to announce the arrival of Michael Rowland as a Legal Director in the team.

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