



### Senior Associate

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#### **I am a senior associate in the private wealth team.**

I advise both UK-based and international clients on wills, succession planning, powers of attorney, Court of Protection applications, trusts and probate. I am a fully qualified member (TEP) of the Society of Trust and Estate Practitioners (STEP).

I also regularly advise charities on governance matters, trustee duties, annual reporting requirements and best practice. My experience extends to the establishment of new charities and the conversion of unincorporated charities to a CIO structure. Most recently I have been involved with providing detailed advice on charity grant making and disposals of land.

As the chair of trustees of a grant making charity, I understand the challenges charity trustees can face, as well as the day to day running of a charity.

#### Areas of expertise:

- Preparation of Wills and Lasting Powers of Attorney
- Estate (succession) planning advice
- Inheritance tax planning
- Administration of estates (probate)
- Trust creation and ongoing trust administration
- Charitable trust creation and governance
- Court of Protection work

#### Qualifications and memberships

- Admitted as a solicitor in October 2019
- STEP Diploma in Trusts and Estates (England and Wales)



- Full member (TEP) Society of Trust and Estate Practitioners (STEP)

If I'm unavailable, please contact:

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