



### Partner and Head of Trusts

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**I am a partner in the tax, trusts and estates team, advising clients on a range of matters including tax compliance, use of trusts and succession planning.**

With nearly 40 years' experience, every day brings different and exciting challenges, I approach each of these with a 'can do' attitude. I enjoy getting to know clients and becoming their trusted adviser.

I employ a common sense approach and try to breakdown complex matters so that they are easy to understand.

### Areas of expertise:

- Tax compliance
- Capital gains tax
- Inheritance tax
- Use of trusts
- Succession planning for individuals

### Qualifications and memberships

- Fellow of the Association of Taxation Technicians - ATT (Fellow)
- Member of the Personal Finance Society and the Chartered Insurance Institute - DipPFS

If I'm unavailable, please contact:

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Trusts Administrator



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