

Wright, Johnston & Mackenzie LLP



Trusts and Tax: Consultancy Service



Trusts have been through many changes in the last 10 years, the most significant being changes to the tax treatment of trusts. These changes have eroded some of the benefits previously associated with trusts and have significantly added to the complexity of advising on, and managing, trusts.

WJM can help you navigate this complex area of law.

WJM has a Trusts and Tax Consultancy Service which offers additional support to advisers in the field of trust and tax law, an area which may not be their speciality but which might be very important to their clients.

The service we can offer is akin to a living reference library – meaning that when you face a challenge with a trust and find you need additional, specialist input, we can help. Like a book, you can take a brief dip in to answer a single question, browse for a second opinion or settle down for a more prolonged relationship.

In providing our service, we can be as visible or invisible to your clients as you wish.

We can provide support in the following areas:

- Interpreting and understanding trust deeds
- Tax efficient investment strategies for trusts
- The office of trustee: their duties and powers
- Is a trust appropriate for the client?
– the pros and cons
- Trust drafting – making sure the trust meets the client's objectives
- Preparation of trust accounts
- Deeds of Variation – when and how they should be used
- Risk management for trustees



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The WJM team has many years of experience in dealing with trusts of all types and is able to draw on the expertise of our tax and financial planning teams to provide a comprehensive service.

If you would like to find out more about this service or discuss how we might be able to assist you, please contact:

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More details can be found at
www.wjm.co.uk

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