mitchell charlesworth
Accountants • Business Advisors

Trust & Estates

Mitchell Charlesworth has an experienced team who deal with an established and expanding base of trust and estate work. This includes the creation and administration of trusts, accountancy and taxation aspects of both trusts and estates, and estate planning issues.

How we achieve success for our clients

We offer advice and assistance that is firmly grounded in long experience of trust and estate situations. Our team is therefore skilled in resolving even the most complex of issues or sensitive ongoing matters.

Trusts

Our team deals effectively with a wide range of trust matters including:

- The creation of new settlements
- Ongoing administration
- Compliance requirements
- Terminating an existing trust

Team expertise

The department includes three qualified members of the Society of Trust and Estate Practitioners. Their expertise covers all types of trust including:

- Discretionary settlements
- Life interest settlements
- Accumulation and maintenance settlements
- Charitable trusts
- Bare trusts

The services offered by the team include:

- Trusts – advice on the creation of all types
- Administration of trust funds – in conjunction with financial institutions and investment managers
- Preparation of annual trust accounts
- Trustees self assessment tax returns
- Trustees income, capital gains and inheritance tax calculations
- HMRC Trust Registration Service (TRS)
- HMRC enquiries
- Partners of Mitchell Charlesworth acting a trustee

Estates

All areas of estate work require an experienced approach and an awareness of the needs of each individual estate. The services our team members are able to offer includes:

- Estate accounts preparation
- HMRC estate registration
- Executors self assessment tax returns/informal submissions
- Executors income and capital gains tax liabilities calculations
- Partners of Mitchell Charlesworth acting as executors

Estate planning

Tax planning can sometimes be seen as concerned solely with tax mitigation. Our team takes the view that the non tax considerations can be equally important and their plans will address both areas.

Team expertise

Any plans that we formulate for you can:

- Protect and preserve your wealth
- Transfer your assets to future generations in a tax efficient manner
- Involve both lifetime planning and provisions for death

Estate services

We employ a number of strategies to achieve successful outcomes for you including:

- Outright gifts
- Use of trusts
- Restructuring existing arrangements
- Advice on structuring wills (in conjunction with a solicitor)
- Ways to fund Inheritance Tax due on death

Contact our team

Mitchell Charlesworth offer a free and confidential initial discussion at which you can outline your situation and your requirements. To begin a dialogue contact one of the partners or Trust & Estate specialists at your nearest Mitchell Charlesworth office.

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