THE BURNSIDE PARTNERSHIP

OXFORD MARLOW LONDON

The Burnside Partnership

Specialist Private Client Lawyers & Tax Experts

A guide for clients

Welcome to The Burnside Partnership

This guide explains who we are, what we do and how we put the lifetime's care of our clients at the centre of our approach

We're here to make every client's life easier – whether it's helping them put their affairs in order, tax planning, supporting families when they suffer a bereavement by dealing with the administration of their loved one's estate, taking the stress out of buying or selling a property, or guiding them through the sensitivities of a family dispute.

You will see in this Guide on pages 4-6 the wide variety of legal and tax services we provide. Many of our lawyers and tax advisors are recognised experts in their field and they and our firm have won numerous awards.

We like to get to know our clients. We're confident that once a client gets to know us and understands how we can help, they'll want to work with us.

Yet our care goes beyond this and we offer our clients a variety of additional services, accessible through The Burnside Partnership lifestyle.

We aim to be a source of information and support for our clients throughout their lives. It may be putting them in the hands of one of our trusted advisors where it's outside our areas of expertise – financial advisors, surveyors, property agents or lawyers practising other areas of the law. In fact, we collaborate with many other professionals to ensure our clients receive the best advice from the experts in their field – and we never recommend another professional we've not worked with before and wouldn't use ourselves.

In short, if we can't help you ourselves, we'll put you in touch with a trusted contact of ours who can.

We're committed to delivering a first-class service to every client - and every client benefits from our **Client Service Pledge** – it's on our website and can also be found on Page 7. We all work to it and we want every client to feel looked after by everyone at our firm.

THE BURNSIDE PARTNERSHIP
Specialist Private Client Lawyers & Tax Experts
lifestyle™

Why instruct our firm?

3 reasons clients choose to instruct us:

1. **Because we're experts** – we're a specialist firm and have in depth knowledge. We believe there's no substitute for experience. We work to the highest standards and many of our advisors are recognised experts in their field – see Page 3 for details.

2. **Because we aim for the highest standard of client service** – we're here to make our clients' lives easier and excellence in our client service drives our whole approach. To this end, everyone at our firm is committed to adhering to our Client Service Pledge - see Page 7.

3. **Because we provide multi-disciplinary advice** – our firm brings together lawyers and tax professionals under one roof, allowing a unique breadth and depth to our expertise. What's more, we work with other experts too.

Who we are

We focus on advising private clients on their legal and tax affairs. We're a team of specialists – which means we know what we're talking about. For detailed profiles of our experts, visit: www.theburnsidepartnership.com/team.

We believe key to our approach is combining professionalism with empathy – we can better help our clients if we can try and step into their shoes.

To ensure everyone is always at the top of their game, we take continuous professional development and training seriously. We've won numerous awards for our training programmes.

We've plenty of Awards and accreditations to our name, as do many of our specialists. These include Solicitor Firm of the Year 2020, The Legal 500 Leading Firm, The Legal 500 Next Generation Lawyers, Leading Private Client Lawyer, Chambers High Net Worth, eprivateclient Top Law Firms, Apprenticeship Employer of the Year Award. For more details, visit: www.theburnsidepartnership.com/awards.

Our staff matter too

We're committed to our people – and we believe that happy staff are more likely to make happy clients.

This is what we do:

- We work as a team – and support each other as colleagues
- We recognise and value everyone – everyone brings their own skills to the table
- We aim to offer everyone interesting work and support continuous development of all our staff
- We encourage diversity in every sense – difference makes a better business
- We want everyone to enjoy working here
- We operate our own award-winning apprenticeship programme

What we do

Wills & Probate

Wills & LPAs

We advise on the many factors relevant to writing a Will, including inheritance tax (IHT) planning. We also consider a client's own individual circumstances in depth to advise on whether to put in place a Lasting Power of Attorney.

Acting as an attorney

We act as attorneys (financial and health & welfare) for many clients. We also provide attorneys with advice to ensure they fulfil their duties & responsibilities.

Probate

Probate can be a daunting task, particularly when coupled with the distress of losing a loved one. We handle probates professionally and efficiently – at the same time ensuring tax planning opportunities are maximised.

Your contact for this service:

ANNA BURNSIDE
anna.burnside@theburnsidepartnership.com
01865 987781

Court of Protection & Deputyship

Applying for Deputyship

We guide clients through the process of applying for deputyship.

We also advise on other Court of Protection applications, including obtaining permission for attorneys to make gifts, dealing with property sales and making statutory Will applications.

Vulnerable adults & children

Our experts are experienced in assisting vulnerable adults and we support parents and carers in making plans to support children with Autistic Spectrum Disorder, special educational needs or whom are disabled.

Unique Experience

Our experts include those who've worked for the Office of the Public Guardian (OPG) and Office of the Official Solicitor – so have unique experience.

Your contact for this service:

EDWARD JAMES
edward.james@theburnsidepartnership.com
07961 020480

Tax & Trusts

Tax planning

Our experts advise on all aspects of inheritance tax (IHT), capital gains tax (CGT) and income tax, for both UK and overseas individuals. We also deal with succession, exit and retirement planning, together with the consequences of divorce and separation.

Non-dom tax planning

Special tax opportunities are available where a client is legally domiciled outside the UK. We advise on domiciled status and explore options available to protect capital, as well as exploring the savings that can be made through using trust-based structures.

IHT planning & the family business

The current tax rules offer several highly favourable tax saving options for owners of a family business. There is no guarantee that these rules will stay in place indefinitely, and now is a good time to take stock of the options available. Whilst the potential for saving tax is highly important, it is important to do what is right for you. Our experts are here to advise you.

Trusts

Trusts can be very valuable vehicles for safeguarding family and business assets. However, they are complex legal arrangements. We guide clients through the complications.

Trusts administration & compliance

We assist trustees with the tax affairs, management and administration of trusts. Trusts can be liable to a range of tax compliance issues and we can ensure these are all dealt with.

Tax health checks

We can review clients' income and capital requirements and help them plan ahead, whether for retirement, selling a business or for succession purposes.

Personal tax compliance

We can prepare self-assessment tax returns, as well as tax repayment claims. We also advise on clients' reporting obligations and provide guidance on correspondence or enquiries with HMRC. We advise clients on the tax consequence of various types of investments, including SEIS, EIS, pensions and shares and maximise the utilisation of tax reliefs and losses.

Your contact for trusts & tax:

JAMES TAYLOR
james.taylor@theburnsidepartnership.com
07903 627562

Your contact for personal tax:

JACQUI BIRKS
jacqui.birks@theburnsidepartnership.com
07983 435097

What we do

Contentious Wills & Estates

We're able to advise both individuals and charities on any contentious matter, including Will challenges, claims against estates under the Inheritance Act and trust disputes between trustees, or trustees and beneficiaries.

Disputes after the death of a relative can be distressing, acrimonious and complex. We take a sensitive and proactive approach, favouring a swift approach to review a claim and advise on next steps to protect the client's position. We work hard to achieve the best possible outcome in the most cost effective way.

TARA MCINNES
tara.mcinnes@theburnsidepartnership.com
07534 581443

Charities

We assist clients in achieving their philanthropic goals – whether leaving a legacy in their Will or setting up and running a charity.

Our charity services include advising on the best type of charitable vehicle to use, preparing governance documents, accounts and management information, completing tax returns, dealing with the recovery of tax due to charities and liaising with the Charity Commission.

JAMES TAYLOR
james.taylor@theburnsidepartnership.com
07903 627562

Bespoke Property Services

High net value residential property purchases & sales

We don't operate a factory churning through conveyances. Instead, our property experts deliver bespoke and exceptional client service to ensure clients' property transactions are managed efficiently and quickly. We support our clients through every stage of the process, also ensuring tax planning opportunities are maximised.

Commercial property transactions

This includes freehold acquisitions and sales and leasehold transactions. We also advise on commercial acquisitions and leasebacks and commercial bank funding transactions.

Negotiating deeds of grant & rights of way disputes

Acquisition & disposal of agricultural property, to include diversification

Your contact for this service:

DAVID RALLEY-DAVIES
david.ralley-davies@theburnsidepartnership.com
07498 920513

How we work

We provide high quality, specialist advice and we're transparent with our pricing. We work on the basis of either a fixed fee where we can or we'll provide a written estimate of our costs.

Our approach to service

We focus on providing our clients with a consistently excellent experience, reflecting the trust placed in us. We believe that great service is founded on developing sound relationships with our clients, so they're confident that we'll understand and meet their needs. Every client should feel looked after by everyone at our firm.

Our team have all pledged to look after our clients in line with the principles set out in our **Client Service Pledge**, detailed on our homepage at: www.theburnsidepartnership.com

In essence, these principles can be distilled as follows:

- We listen to our clients and work to fully understand their unique needs
- We advise clients clearly, explaining any legal jargon
- We work pro-actively, responding quickly and constantly keeping clients informed
- We provide a cost-effective service with transparent pricing

Organisations we support

We support Aspiring Solicitors, an organisation committed to increasing diversity in the legal profession. We have helped establish and support The Fiona Wheeler Charitable Foundation, a charity established in memory of the co-founder of our firm. The Foundation is focussed on helping disadvantaged young people and aiding social mobility.

In addition, throughout the year our firm supports a number of other charities. Amongst other initiatives, we support 'Remember a Charity' and our staff are members of the Alzheimer's Society Dementia Friends and Solicitors for the Elderly.

We also support mygworks, the business community for LGBT+ professionals, graduates, inclusive employers and anyone who believes in workplace equality.

Alzheimer's Research UK
Make breakthroughs possible

SFE
SOLICITORS FOR THE ELDERLY
ACCREDITED

Contact us:

Our Oxford Office

The Carpenters' Workshop,
Blenheim Palace Sawmills,
Combe, Oxfordshire
OX29 8ET

Tel: 01865 987781

Email: info@theburnsidepartnership.com

Our Marlow Office

Marlow Place,
Station Road, Marlow,
Buckinghamshire
SL7 1NB

Tel: 01628 301221

Email: info@theburnsidepartnership.com

We're constantly looking for ways to improve the service we offer clients

If you have any feedback or ideas, please contact Della Burnside, Managing Partner on della.burnside@theburnsidepartnership.com or 07889 615593. We'd love to hear from you.

THE BURNSIDE PARTNERSHIP

OXFORD MARLOW LONDON