THE BURNSIDE PARTNERSHIP

OXFORD MARLOW LONDON

The Burnside Partnership

Specialist Private Client Lawyers & Tax Experts

A guide for clients

eprivateclient Excellence 2023 Awards

The Lawyer Awards Finalist – Boutique firm of the year

eprivateclient Top Law Firms 2022

Chambers High Net Worth 2022

The Legal 500 United Kingdom Leading Firm 2023

Welcome to The Burnside Partnership

This guide explains who we are, what we do and how, when you become our client, we put your care at the centre of our approach.

We are here to make your life easier, whatever the opportunity or obstacle you are facing. If you want to structure your tax matters more efficiently, provide for a secure future or attain peace of mind with an updated will, we can help. We can support you to administer a loved one's estate following a bereavement or guide you through a dispute within your family.

Our award-winning team handles a huge variety of legal and tax services, and many of our lawyers and tax advisors are recognised experts in their field. We offer more than just technical expertise, however. Our clients have come to expect canny thinking, deployed to achieve the best results possible. To achieve those results, we sometimes collaborate with professionals working in areas outside of our expertise – financial advisors, surveyors, property agents or lawyers practising in other areas of the law. As our client, you can be sure we will never recommend another professional we have not worked with before and would not use ourselves.

We enjoy getting to know our clients, often forming relationships that span generations. We are a new breed of private client consultancy: our vision is to support you with life, not just law, and as such we are constantly expanding what we offer. Read on to discover the breadth of our services, and the commitment we make when we work with you, in our Client Service Pledge.

Why instruct our firm?

Three 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 experts visit here.

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 The Legal 500 Leading Firm 2023, Chambers High Net Worth 2022, The Legal 500 Next Generation Lawyers, Leading Private Client Lawyer, eprivateclient Excellence Awards 2022, Chambers High Net Worth Solicitor Firm of the Year 2020, eprivateclient Top Law Firms, Apprenticeship Employer of the Year Award.

For more details visit here.

Our story

We were founded in 2015, established to provide technically excellent advice delivered with sensitivity, in a clear straightforward manner. Though the scope of our work continues to grow, the philosophy that guides our approach remains the same, and clients continue to value to what we do.

SOLICITOR FIRM OF THE YEAR
National
WINNER
The Burnside Partnership

eprivateclient
Excellence 2022 AWARDS

eprivateclient
Top Law Firms 2022

THE LAWYER Awards
FINALIST
Boutique firm of the year

Chambers
High Net Worth
2022

The Legal 500
United Kingdom
Leading Firm
2023

What we do

Wills & Probate

Your contact for this service:

DANIEL VERNEDE
daniel.vernede@theburnsidepartnership.com
07494 577355

CAROLINE BELAM
caroline.belam@theburnsidepartnership.com
020 3883 1288

KITTY SOKOL
kitty.sokol@theburnsidepartnership.com
020 3883 1288

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 and responsibilities.

Probate

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

ALISON CRAGGS
alison.craggs@theburnsidepartnership.com
07958 658115

Court of Protection & Deputyship

Your contact for this service:

ALISON CRAGGS
alison.craggs@theburnsidepartnership.com
07958 658115

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 those who are disabled.

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

International private wealth

In an age of international mobility, we recognise the importance of supporting our clients on the wide-ranging and complex legal issues and tax- and regulatory-related challenges of protecting and preserving their global wealth.

Our specialist international advisors have extensive experience in providing UK advice on matters with a non-UK element, including UK domicile and residence advice, cross-border wealth and estate planning and the use of appropriate offshore holding vehicles.

We appreciate that dealing with the various issues that can arise to a client with international connections may be daunting. We always strive to provide clear and practical advice so that our clients know their concerns have been answered and their needs met.

Working with trusted advisors in other jurisdictions or the clients' network of advisors, we pride ourselves on being able to deliver a seamless and co-ordinated service to our clients, regardless of where in the world they (or their family or assets) are located.

Examples of the areas where we can provide expert and practical advice include cross-border wealth structuring and the use of offshore holding vehicles; compliance and risk management aspects of tax and trust transparency measures; pre-UK residence planning and restructuring; and examining an individual's UK tax residence status.

CAROLINE BELAM
caroline.belam@theburnsidepartnership.com
020 3883 1288

KITTY SOKOL
kitty.sokol@theburnsidepartnership.com
020 3883 1288

What we do

Tax & Trusts

JAMES TAYLOR
james.taylor@theburnsidepartnership.com
07903 627562

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 consequences of various types of investments, including SEIS, EIS, pensions and shares and maximise the utilisation of tax reliefs and losses.

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 here.

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 proactively, responding quickly and constantly keeping clients informed
- We provide a cost-effective service with transparent pricing

Our staff matter

+ We're committed to our people. We believe happy staff make for happy clients
+ We work as a team and support each other
+ We recognise and value everyone
+ We offer our team interesting work and continuous development
+ We encourage diversity in every sense
+ We aim to create an environment where everyone enjoys their work and being part of the team
+ We operate our own award-winning apprenticeship programme

Organisations we support

We support Aspiring Solicitors, an organisation committed to increasing diversity in the legal profession, and a number of other charities including 'Remember a Charity'. We have helped establish and support The Fiona Wheeler Charitable Foundation, a charity established in memory of the co-founder of our firm to help disadvantaged young people and aid social mobility.

Our staff are members of the Alzheimer's Society's Dementia Friends, as well as Solicitors for the Elderly. We also support myGworks, the business community for LGBT+ professionals, graduates, inclusive employers and anyone who believes in workplace equality.

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

Our London Office

Melbourne House,
46 Aldwych
London
WC2B 4LL

Tel: 020 3883 1288
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.