



Trust Review

Why did you set up your Family Trust, and does it reflect your current objectives?

The robustness of Family Trusts is under ongoing scrutiny as a result of the Law Commission review on the law of Trusts. Our Trust Review service examines the set up of your trust, identifies any administration gaps, and ensures your Trust is compliant with legislation and that trustees are meeting their obligations.

We've developed a number of resources to help you to understand this sometimes complex topic. We provide this service to ensure your existing Trust reflects your current intentions using the simplest structure possible and also meets with statutory requirements.

It's about maximising benefits you may be entitled to and protecting your assets from relationship property, family and creditor claims while preserving value for future generations.

Changes in circumstances and legislation can seriously impact your existing Trust structure. Call us today for a Trust Review.

Benefits of having a Trust Review:

- Gain an increased understanding of how your Trust operates
- Identify potential tax savings
- Highlight any areas of risk/concern
- Develop peace of mind that your Trust is working for you
- Ensure optimal tax structuring and asset protection for future major transactions
- Ensures your Trust is compliant with legislation and statutory requirements
- Avoid your Trust being deemed a sham

During your Trust Review we'll provide recommendations for any changes and improvements to ensure your trust is aligned with your goals and intentions. Where applicable we will forward instructions to your lawyer for any necessary changes.

Call us on 07 578 0489 today for a comprehensive Trust Review to ensure your Trust is robust and compliant.