

Private Client Services



Lodders
solicitors

Private Client Services

Lodders is an established and thriving law firm that is built on providing outstanding legal advice to individuals and privately owned businesses. Based in Stratford upon Avon and with offices in Henley in Arden and Cheltenham, we combine thoughtful, intelligent advice with a highly personal service.

“first rate and professional”
Chambers Guide to the UK legal profession

Private clients are at the heart of our business, which is one of the reasons why our private client team has a national reputation for excellence, and top tier rankings from both Chambers Guide to the UK Legal Profession and the Legal 500.

Our strength is in our team, and the individual specialisms within it. The team is headed by our senior partner Martin Green, who sits on the main capital taxes sub-committee of the Law Society, whilst six of our staff are members of the Society of Trust & Estate Practitioners, two solicitors serve on the Deputyship Panel of the Office of the Public Guardian and we were one of the founder

members of the Solicitors for the Elderly group. Unusually for a law firm, we also have a partner who is a Chartered Tax Adviser.

Whether you are taking care of your family, planning for the future or planning for today, we have the right experts on hand to help across all aspects of wills, trusts, estates and tax planning, and care and capacity matters.

“Very professional legal services matched with a very personal and caring service”

Estate Planning, Tax and Trusts

Trust Administration

Wills and Succession Planning

Probate

Whether your concerns are business, personal or a mix of the two, Lodders' estate planning specialists can help you preserve and transfer your wealth to future generations. From the tax efficient structuring of businesses and landholdings through to strategies to mitigate tax, we can help you protect your vital assets. Our private client lawyers can advise on all types of trusts, family investment companies, and the use of partnerships, LLPs and companies in wealth structuring. We also provide effective tax advice on property transactions as well as agricultural and business property relief.

Trusts are an effective way to transfer wealth to current and future generations. Through Lodders, you have access to a heavyweight team of private client and tax lawyers. We can advise you on both new and existing trusts, help you to establish the optimum trust structure to meet your objectives, and deal with all aspects of the management of your trusts. We can help you mitigate tax, support trustees with complying with their duties and powers, and advise you on the effective management of assets held within your trusts.

Lodders' friendly and effective team has years of experience in drawing up wills, whether you are starting from scratch or updating or amending an existing document. We advise on lifetime gifts, and the appropriate inheritance tax exemptions. We can also consider the allocation of existing pension arrangements and life assurance policies. On a practical note, we help you appoint guardians for infant children. We can even make sure that your pets are provided for! The team has helped many family business owners put effective succession structures in place.

Dealing with someone's estate is practically and emotionally draining, and it can be reassuring to ask for professional help. Our skilled probate team supports clients through this difficult process. We handle matters with speed, fairness and sensitivity. We prepare inheritance tax returns and estate accounts, and can advise on post-death tax planning and deeds of variation. We also deal with agricultural, business and foreign assets, offering you every assurance that the estate is in good hands.



Care and Capacity

Contentious Matters

Our unique Care and Capacity team provides advice and support to clients on a variety of complex matters. We prepare lasting powers of attorney for elderly clients, trustees and business owners. Our team advise on applications to the Court of Protection for the appointment of Deputies, or for statutory wills or gifts to be authorised. We help clients understand the types of long term care and funding options available, and challenge fee decisions made by the NHS and local authorities. We also look after the finances of vulnerable clients who need extra support, a valuable service.

Disputes, claims and challenges should never be taken lightly. This is especially true with wills, trusts and estate planning. That's why we have experienced advisors to deal with these emotive and complicated issues. We assist with the interpretation of wills and trusts, and make sure everyone involved understands the provisions. If a will is wrong, or an estate isn't administrated the right way, we can sue for professional negligence. Our team can also explain the duties of attorneys, executors and trustees, and remove people from their roles if required.



Lodders Solicitors LLP

Stratford upon Avon

Number Ten Elm Court, Arden Street,
Stratford upon Avon,
Warwickshire CV37 6PA

T: 01789 293259 **F:** 01789 268093

Lodders Solicitors LLP

Henley in Arden

16 High Street, Henley in Arden,
Warwickshire B95 5BW

T: 01564 792261 **F:** 01564 794821

Lodders Solicitors LLP

Cheltenham

25 Imperial Square, Cheltenham,
Gloucestershire GL50 1QZ

T: 01242 228370 **F:** 01242 226155

Lodders has specialist teams that advise on:

Agriculture
Business & commercial
Care & capacity
Charity
Dispute resolution
Employment
Estate planning, tax & trusts
Intellectual property
Landed estates
Notarial services
Probate
Real estate
Residential property
Trust administration
Wills & succession planning

www.lodders.co.uk
 @LoddersLawyers

Lodders
solicitors