eprivateclient

NextGen Leaders

2023

Cazenove Capital

PAM INSIGHT

Published by PAM Insight Limited
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Editorial

Will Sidery, Senior editor, PAM Insight
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Design: Oneiros Design

Introduction

Congratulations to the 81 individuals – selected from almost 500 nominations – who made the rankings this year.

This annual listing supersedes the *eprivateclient* UK and UK Crown Dependencies Top 35 Under 35, which launched in 2009. We decided it was time to rebrand the initiative, to reflect changing trends in the modern workplace.

As part of the change, we removed the age limit, instead focusing on the number of years of qualified work experience. This ensures that we are not excluding those who may have had career breaks or career changes.

Instead, the initiative was opened to anyone with 17 years or less industry experience.

We also removed the cap of 35 men and 35 women making the final list, meaning we will be able to recognise any number of individuals, provided they meet the high standards set out in the judging criteria.

Judging by the senior editorial team at PAM Insight was based on the qualities and achievements of the individual. Other factors taken into account included the reputation or performance of the company that the nominee works for, feedback from superiors, as well as trajectory of promotion/business development success and age (i.e. younger individuals achieving relatively senior positions).

At the same time the judging panel also looked at any volunteering outside of work, or mentoring and advocacy within the industry.

Will Sidery
Senior editor
PAM Insight

Foreword

We are delighted to be associated with *eprivateclient*'s Next Gen Leaders and the outstanding young private client practitioners whose achievements it celebrates.

The world we live in is changing at an unprecedented pace. Recent years have seen the highest inflation in decades, mounting evidence of climate change and a significant rise in geopolitical risk. As a result, there is ever greater need for high quality advice to ensure that investors can meet their objectives, now and for generations to come.

I am proud of the continuity that Cazenove Capital provides our clients. Many have trusted us with their affairs for decades. At the same time, our success is built on an openness to new ideas and a confidence in the next generation of talented professionals, who bring energy and creativity to our industry.

One of the great joys of my role is to see talented people develop and progress – and to be challenged by the fresh perspectives they bring. We involve younger team members in client relationships from an early stage and encourage them to take on more responsibility as they progress. We are working hard, along with our parent-company Schroders, to ensure that the next generation of professionals reflects the diversity of the UK today.

I hope you enjoyed this year's event. I know that video calls can make life easier. However, there is still some magic to meeting colleagues, peers and clients face-to-face. So much of what we do is about building relationships of trust – and it is undoubtedly harder and less fun through a computer screen!

Many congratulations to those who have been recognised in these awards. I hope your careers go from strength to strength and we look forward to working with you in future years.

Mary-Anne Daly
Chief Executive Officer
Cazenove Capital

Radhika Mehta

Legal counsel
Accuro

15 years' experience

Radhika is legal counsel at Accuro Fiduciary, having started the role two and a half years ago. She has experience in private practice with law firm Charles Russell Speechlys and in-house with a single family office for a billionaire entrepreneur. In addition to fee-earning she has also assumed and carried out roles as deputy anti-money laundering officer and steward of the onshore new business committee for Accuro in England. For Accuro Group internationally, Radhika has used her knowledge and delivery of B Corp certification and work in the philanthropy sector to project manage the group signatory and reporting to the UN Global Compact and the alignment of the group business philosophy along three selected United Nations Social Development Goals. Radhika has developed a specialism in the English tax, compliance and regulatory market. One nominator said: "Radhika is a superb ambassador for our firm and industry, locally and internationally in the markets in which she works. Her work ethic and emphasis on hard work, self-development and team wellbeing evidence her sense of responsibility and putting others first."

Sarah McBrearty

Director
Alex Picot Trust

15 years' experience

Within a 13-year period which Sar5ah commenced as a trainee, she then held client administration and relationship roles, before becoming a trust manager. Sarah worked in the bookkeeping and accounts teams and used this experience to qualify as an accountant. She became a main board director of the trust company in 2020. Sarah has board responsibility for staff matters and draws upon her own background moving though the business from trainee to director to support our team in achieving their career goals while enabling the business to enjoy continued success. One nominator said: "Sarah's key qualities are her professionalism, natural leadership skills, determination and sensitivity towards our clients' family matters, above and beyond her years."

Jonathan Brecker

Director
Alvarez & Marsal Tax

11 years' experience

Jonathan is a trusted adviser to many ultra-high net worth families and their structures. Jonathan also has a particular interest advising UHNW families from the Middle East and Far East, always closely collaborating with A&M's offices across the globe. Examples of recent clients he has sourced in recent months include the re-domiciliation of a global structure across six jurisdictions, delivering advice to non-UK trustees reviewing and advising on the merits of certain structures; and pre-arrival and residence advice to a number of Hong Kong resident families ahead of moving to the UK, whilst managing their overseas business interests. Jonathan is also an industry expert regularly advising private equity executives and their families ahead of liquidity events. In his spare time, Jonathan volunteers and mentors secondary school students providing them with valuable exposure to working life, helping explore career options at an early stage. In addition, Jonathan has successfully run events for 10x10 Philanthropy in the UK, raising funds for charitable causes.

Christopher Cook

Senior associate
Baker McKenzie

9 years' experience

Christopher is a senior associate and solicitor advocate in Baker McKenzie's global wealth management practice. He works closely with financial institutions, ultra-high-net worth individuals and leading entrepreneurial families on a broad range of wealth management matters. He advises on a variety of areas, including cross-border and general tax planning, life insurance structuring, trusts, succession planning, and business structuring, as well as advising on contentious matters including issues concerning the validity of offshore trust structures, national and international tax investigations and family disputes. Christopher has significant experience in designing and establishing bespoke international asset-holding and wealth management structures including private trust companies, limited partnerships and family offices. Christopher also has experience in advising charities and individuals on philanthropy and not-for-profit matters.

Phyllis Townsend

Partner
Baker McKenzie

15 years' experience

Phyllis is a partner in Baker McKenzie's wealth management team, following her promotion over a year ago, with effect from 1 July 2022, after 10 years at the firm. Prior to joining Baker McKenzie, Phyllis trained at SJ Berwin and spent two years in-house at Rothschild Trust in Zurich and London. She is also the chair of the global and EMEA wealth management steering committees. In her role, Phyllis focusses on family office work and investment structuring as part of Baker McKenzie's alternative capital practice. She advises on a range of wealth management matters for clients globally, including clients with connections to the Middle East, Europe and US. A nominator added: "Phyllis is very good technically, extremely responsive and clients and colleagues enjoy working with her. Phyllis has a good intermediary network, which are a good referral source for her as she continues to build her practice."

Lorna du Sautoy

Partner
BDB Pitmans

11 years' experience

Lorna joined BDB Pitmans in April 2021 as a legal director after 10 years at Macfarlanes where she trained. Lorna joined the partnership at BDB Pitmans in June 2023. She has a wide-ranging practice advising HNW and UHNW private clients and their companies, overseas and institutional investors, family offices, charities, banks and trusts on prime and super prime London residential property and other high value property assets including country mansions and estates, racing stables, vineyards, country house hotels, golf clubs and more. Lorna also advises on construction, design and development of property, leasehold enfranchisement and secured lending transactions. Her collaborative approach means that she is popular with London agents and works closely with other private client advisers (such as family, tax, trusts and estates lawyers, accountants, wealth managers) to provide holistic client-focussed advice. Lorna is also the firm's guru on tech innovation as it affects private client and real estate and writes regularly on Web3, PropTech, the metaverse, cryptocurrency and AI for private client practitioners. She is the chair of the firm's ED&I strategy group which is responsible for initiatives promoting an open, welcoming, and inclusive working environment, highlighting the power of allyship and widening access to the legal profession. Lorna is a committee member for the firm's ethnic and cultural diversity network SHINE and an ambassador for the firm for Aspiring Solicitors and other social mobility initiatives.

Becky Hartley

Associate director
BDO

11 years' experience

Also named as an *eprivateclient* Top 35 Under 35 in 2022, Becky is an associate director in the tax dispute resolution team at BDO which sits within the firm's private client services group. She is experienced in providing advice to individuals, partnerships, corporates and trusts in respect of historical UK tax issues. She assists clients under formal tax investigations and enquiries opened by HMRC by making disclosures, negotiating settlements, including penalties negotiations and dealing with debt enforcement. Having spent three years in Singapore working with BDO Singapore in the private client tax team, Becky also has experience working with high-net-worth individuals and family offices in Asia. She has played an integral role in the recently launched Asia Advisory Services Group, which focuses on advising private clients based in Singapore, Hong Kong and China on UK tax matters. In addition, she is the "transparency" tax champion and focuses a lot of her time working with offshore intermediaries who have clients with UK tax issues. She has built up an extensive international network and is well known in the Asia market. She also works closely with the BDO international network to provide cohesive cross border services to clients.

Kirsten Brass

Senior associate
Bedell Cristin

10 years' experience

Kirsten is a senior associate in Bedell Cristin's international private client team. She has nine years of non-contentious private client experience, firstly in Scotland where she qualified as a lawyer and then in Jersey after having relocated to the island in 2017. Kirsten regularly advises professional trustees and high net worth families on all aspects of Jersey trusts, foundations and the related company and commercial law issues. She also continues to build on her corporate offering, advising clients on their associated commercial needs which has included a number of company migrations in and out of Jersey. Kirsten also has significant experience advising families in relation to their local and international estate planning. One nominator said: "She is passionate about protecting vulnerable clients and regularly advises in relation to capacity, powers of attorney and delegateships. Kirsten is one of only a few lawyers in Jersey who has the breadth of experience to be able to advise clients on their structures and also on the more personal estate planning side".

Michael Holland

Partner
Blick Rothenberg

13 years' experience

Michael is a partner at Blick Rothenburg, having been promoted on 1 July 2023. He has been at the firm for four and a half years, having joined from EY Frank Hirth, where he worked for over eight years, latterly as a tax technologist. In his current role, he helps businesses expanding into the US manage their US corporate tax issues and filings, American entrepreneurs living in the UK with their US and UK tax affairs. He also deals with US corporate tax for foreign corporations, international tax and US tax. One nominator said: "He has strong technical skills and his client relationship management is well-honed, regularly receiving excellent feedback. Michael's people management skills are first class; he puts people first and centre of everything he does through line management, mentoring and helping run a sub-team within the US/UK Department of Blick Rothenberg. He is without doubt a future leader of the business."

Katie Male

Senior associate
Boodle Hatfield

5 years' experience

At almost six years qualified, Katie has quickly become indispensable to all four partners in the family team at Boodle Hatfield and in recognition of this, in May 2023 she was promoted to senior associate. Katie has experience in a range of aspects of family law, including divorce, financial remedy proceedings, cohabitation disputes and pre- and post-nuptial agreements. Katie has been involved in a variety of complex cases acting for clients with connections to numerous jurisdictions including Cyprus, Greece, Italy, Belgium, Switzerland, France, Canada, BVI, Dubai, Iraq, Argentina, Singapore, Lebanon, Azerbaijan, USA, Russia, Panama, Channel Islands and Saudi Arabia. She has also organised and introduced evening seminars for other family lawyers given by junior barristers. In 2021, the firm established the staff forum, a platform for open communication between leadership and staff. Katie is the family team representative in the forum, having been identified by management as someone in whom her peers would confide. Outside of work Katie enjoys listening to and attending performances of a wide range of musical genres, from Glastonbury to Glyndebourne.

Edward Hayes

Director
Burges Salmon

10 years' experience

Promoted in May this year, Edward is a director within the private client and wealth structuring team at Burges Salmon and specialises in a number of areas. These include UK taxation of non-UK resident trusts and companies, UK tax planning for UK resident and non-resident individuals, disclosures to HMRC in order to regularise the tax affairs of trustees and individuals (particularly where those liabilities relate to assets held offshore) and cross-border estates and succession planning (including the effect of the European Succession Regulation). Edward is a co-host of 'Death and Taxes', the private client podcast from Burges Salmon. He is also a member of, and regularly chairs, STEP's Data Protection Working Group and has also spoken at events on a number of subjects, including the UK's taxation of non-domiciled individuals and the taxation of UK residential property.

Helen MacLeod

Senior associate
Burges Salmon

7 years' experience

Helen trained at Charles Russell Speechlys - qualifying in 2016 - before joining Burges Salmon's private client team in 2019 and being promoted to senior associate in Autumn 2022. She specialises in providing tax and structuring advice to clients with international connections. Helen has significant experience advising financial institutions, individuals and trustees on international tax and trust matters including personal taxation, particularly for UK resident non-domiciled individuals; UK taxation of non-UK resident trusts and companies; pre-arrival tax planning for those moving to the UK; multi-jurisdictional Wills and succession planning; and disclosures to HMRC in order to regularise the tax affairs of trustees and individuals. Helen's clients are worldwide, however she has a particular focus on those with connections to Europe (having studied languages in university and lived in both France and Italy for periods) and South Africa, as well as institutional clients in the Channel Islands.

Kellie Sherwill

Advocate & associate
Carey Olsen

11 years' experience

Kellie is a Guernsey Advocate of the Royal Court and an associate in the dispute resolution and litigation team at Carey Olsen. She advises local and international clients on a wide range of contentious and non-contentious disputes, with a particular focus on private wealth and contentious and semi-contentious trust matters including estate and succession planning. Kellie was called as a barrister of England and Wales in 2016. Upon returning to her native Guernsey, she qualified as a Guernsey advocate and joined Carey Olsen in February 2023. Kellie is a member of The Honourable Society of the Middle Temple. She continues to act as a mentor for Pupil Barristers and students who require advice on the profession and experience of the steps taken to qualify. Kellie also looks to mentor local students with an interest in studying law, most recently having delivered talks to students at the three secondary schools. She is a member of the Guernsey Bar and sits as Membership Secretary of the Guernsey International Legal Association. Kellie sits on a number of committees and undertakes a number of voluntary roles including sitting as a member of the Child Youth and Community Tribunal, trained as a Samaritan and provides Duty Advocate services for Guernsey Legal Aid. Kellie is awaiting confirmation of a date to join a board to assist with legal matters relating to mental health matters.

Pierre Ali-Noor

Senior associate
Carey Olsen

12 years' experience

Pierre is a senior associate in Carey Olsen's litigation team in Jersey. He specialises in the court-related aspects of trusts and private wealth practice and is engaged in a broad spectrum of private wealth work covering advisory, administrative and contentious trusts matters. He is regularly involved in applications by trustees for administrative directions, applications by trustees and beneficiaries for relief on grounds of mistake, applications for orders approving compromises of disputes on behalf of minor, unborn and unascertained beneficiaries and applications for rectification of trust instruments. In addition, he practises all other aspects of Jersey commercial litigation. Pierre was called to the Bar of England & Wales by Gray's Inn in 2011 and subsequently trained and requalified as an English solicitor with Herbert Smith Freehills in London. Pierre moved to Jersey in 2016 and became an Advocate of the Royal Court of Jersey in 2021.

Gabriele Colombaioni

Senior tax adviser
Charles Russell Speechlys

14 years' experience

Gabriele joined Charles Russell Speechlys last year and advises clients on Italian tax. His work focuses on cross border private clients matters concerning the relocation to and from Italy of HNW individuals and business executives and the taxation of trusts and estates. His experience includes assisting a senior manager of a private equity firm in obtaining a ruling from the Italian Revenue Agency on the tax treatment under the Italian lump sum tax regime of the carried interest from several complex fund structures and also advising a Jersey trustee on the Italian tax consequences of the termination of a trust holding valuable Italian real estate through an offshore corporate structure. Gabriele is admitted to practice in Italy.

Katie Talbot

Partner
Charles Russell Speechlys

14 years' experience

Katie is a newly promoted partner within the landed estates team at Charles Russell Speechlys and is lead adviser for ten major landed estates, which include some of the firm's most notable clients. Katie is a leading specialist within the firm on agricultural and business property reliefs for the firm's rural land-owning clients, with an in-depth knowledge of creating and operating partnerships (both general and LLP). Katie co-chairs the firm's task force on natural capital/biodiversity net gain initiatives and contributed to the firm's response on reform of Agricultural Property Relief in June 2023. Katie is also chair of the Charles Russell Speechlys Charitable Foundation Community Fund for Cheltenham and recently nominated to act as ambassador to a key charity partner.

Sophia Leeder

Senior associate
Charles Russell Speechlys

12 years' experience

Sophia advises on all areas of family law, including separation agreements, divorce, financial issues following separation and divorce, child contact and residence (or 'custody') issues and pre and post nuptial agreements. Sophia is described by a nominator as "an able and unflappable lawyer" whose "work is excellent and her clients really value her dedication to their cases". She joined Charles Russell Speechlys in 2009 and in 2010 undertook a seven month secondment as an in-house trainee solicitor at a communications company. She helps to mentor Charles Russell Speechlys' trainee lawyers and volunteers outside of work, helping to coach a girls' cricket team. She is attending overseas conferences in October in Rome and Zurich to help build her international practice, being a member of AIJA (a global association of lawyers aged 45 and under), as well as the UIA (International Association of Lawyers).

Laura Hasson

Senior associate
Clifford Chance

10 years' experience

Laura is a senior associate in Clifford Chance's litigation and dispute resolution department and is a leading member of its private wealth and trusts disputes team. Laura has been at the firm just over 10 years, during which time she has specialised in contentious trust disputes and trust advisory work, which is typically complex, high value and spanning a number of jurisdictions. Her recent experience includes acting for the trustees in a multi-jurisdiction family dispute; acting for a high-net-worth-individual in a shareholder dispute over control of a business; advising a family of beneficiaries in respect of complex cross-jurisdictional proceedings; and working on the enforcement of an arbitration award against a HNWI involving precedent setting issues of consumer rights legislation. Laura has built a network of contacts within the industry and is well respected. She is a regular speaker at private client conferences including Geneva, Villa d'Este and Bermuda. In addition to her fee earning work, Laura is the UK co-chair of the firm's gender parity network, Accelerate. Over the last year, Accelerate has hosted the firm's Brilliant Breakfast event, the Next 100 Women in Law awards, with Lady Hale as keynote speaker and a client event with Elliot Rae about equal parenting and gender parity, as well as helping coordinate the firm's efforts to celebrate Women's History Month. Laura is also the managing associate for the firm's pro-bono clinic focusing on issues faced by survivors of domestic violence.

Aidan Grant

Senior associate
Collyer Bristow

7 years' experience

Having qualified in 2016, Aidan is a senior associate in Collyer Bristow's trusts, tax and estate planning team. He joined Collyer Bristow in September 2016 and advises resident non-domiciliaries, UK and international trustees and domestic clients on matters spanning pre-immigration planning, residency and domicile rules, international tax planning and UK wills and estate planning. In particular, Aidan's work focuses on working with high net worth clients with UK/US interests, for example mixed domicile marriages, UK resident US citizens or UK resident beneficiaries of US trusts. Aidan - who is the host of a US/UK tax and estate planning podcast operating for over two years - studied politics at Durham University and graduated in 2011.

Danielle Cottignies

Director
Crestbridge

13 years' experience

One of the first team members to join Crestbridge Family Office Services in early 2014, Danielle has risen swiftly and consistently through the ranks to a leadership role, and became its youngest female director. Danielle leads a large client team ranging in seniority from trainee to manager, and is responsible for administering investment portfolios, private equity, financing vehicles and commercial and residential real estate. She manages several key, complex and extremely large family office structures, including for Middle Eastern clients that involve multiple asset classes, Shari'a compliance criteria and multiple jurisdictional factors. She is also a leader within the business in understanding the risks and opportunities of structures with varying degrees of interest in ESG investment and monitoring requirements. She holds the ICSA Diploma in offshore finance and administration, the CISI Islamic Finance Qualification and has completed the STEP advanced certificates in advising the family business and family business governance. She has also been awarded the Sustainable and Responsible Investment Certificate with CISI and is studying for a Diploma in ESG with the Corporate Governance Institution. Danielle also sat on the Jersey Finance innovation in sustainable finance working party as well as playing a significant role in Crestbridge's group ESG strategy and policy.

Helen Fisher

Partner
Cripps

10 years' experience

Helen, a newly appointed partner at Cripps, advises on a full range of family law issues, with a particular focus on complex matrimonial finance cases, including those involving pensions, asset/wealth protection and intractable children disputes, including complex welfare issues. Helen is increasingly instructed to prepare and advise upon pre and post nuptial agreements. The majority of Helen's work originates from referrals made personally to her - internally from colleagues and externally from former or existing clients and intermediaries. She is technically astute, proactive and determined to achieve the best outcome for her clients. She is noted by clients for her adaptability and thoughtful approach as well as forensic attention to detail.

Nick Parkinson

Senior manager
Crowe UK

8 years' experience

Nick is a private clients senior manager at Crowe UK, taking on the role in October 2022. He initially joined the firm in 2014 as a senior executive. Before that, he was a tax senior at Cassons for almost a decade. One nominator said: "I have worked closely with Nick for many years and seen him develop into the excellent tax adviser he is today. He is detailed, methodical and highly technical without losing the approachable nature needed to relate well to clients and the team. He is incredibly modest about his talents but equally very generous with his time helping others in our local team but also at a national level. He is very comfortable in that 'corporate/PC' space that sometime alludes the more traditional PC adviser but is incredibly important in today's world. I have no hesitation in recommending Nick."

Kate Brett

Senior associate
Dawson Cornwell

5 years' experience

Kate advises on all issues relating to relationship breakdown; divorce, cohabitation and applications for financial remedy, as well as complex children related matters including domestic child arrangements and international and domestic relocation. Much of Kate's work has an international element and she has acted for clients and assisted on several reported cases including a multijurisdictional case in the UK Supreme Court and Court of Appeal; a multi-week High Court fact-finding and welfare case concerning allegations of attempted murder, child sexual abuse and trafficking, across two jurisdictions; complex financial remedy cases involving trust assets; and, high value finance cases. Additionally, Kate devotes herself to pro bono work. Every week she volunteers at Islington Legal Advice Centre. She is also a member of the Westminster & Holborn Law Society and was the past Chair of its Equality Diversity and Inclusion Committee. Kate is a member of Resolution and YRes. Kate speaks, reads and writes German, a country in which she has lived, worked and studied.

Harry Warren

Director
Deloitte

12 years' experience

Harry has recently been promoted to director and is a leader within Deloitte's London and Cambridge private client services team, leading engagements with ultra-high net worth individuals, with a particular focus upon entrepreneurs and their businesses. Harry has established himself as the trusted adviser to entrepreneurial clients across Cambridge and the wider South East by being proactive and, to quote a client, "one of the most responsive professionals [he has] ever come across." Harry has been with Deloitte since 2013, having started his career at HW Fisher. Alongside Harry's client responsibilities, he takes an active role in developing his team to bring on the future leaders and has taken the lead on developing and running the 'Deloitte Private Client Forum' in Cambridge – bringing together private wealth practitioners in the Cambridge market.

Jack Barstow

Associate director
Deloitte

9 years' experience

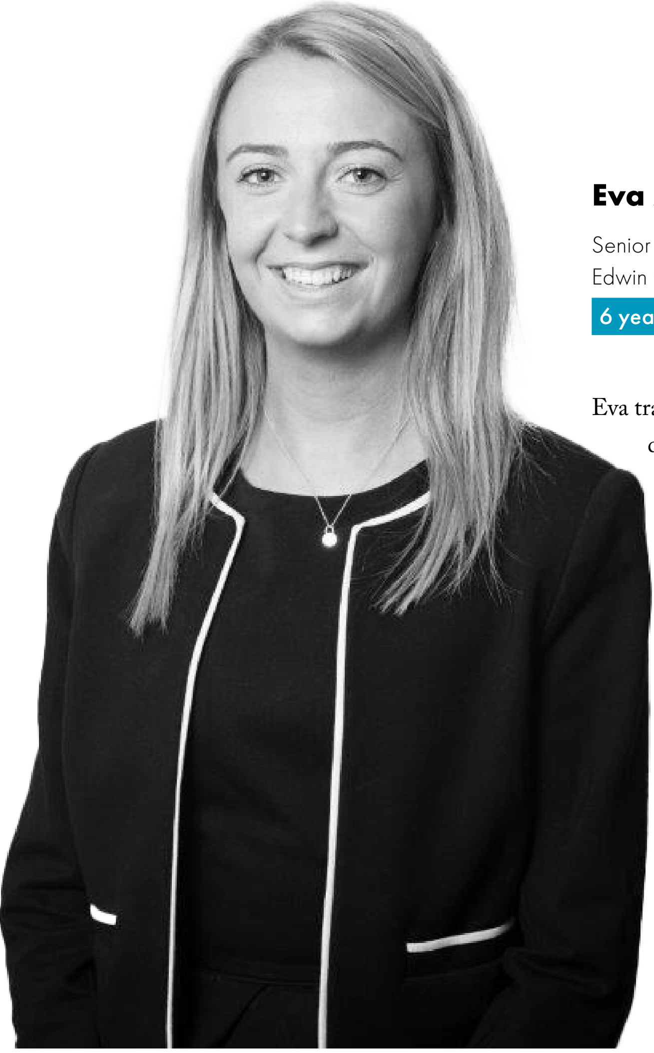
Having joined Deloitte as a graduate in 2014 with no prior tax or accounting experience, Jack very quickly established himself as a key leader within the Deloitte private client team in Cambridge, winning the ATT Mid-Anglia branch prize in 2016 and qualifying as a Chartered tax adviser in 2017. In 2018 he completed a secondment to the Deloitte's tax policy group team to further develop the breadth of his technical abilities and in 2020 Jack was promoted to associate director at the age of only 27. Since 2021 Jack been the lead facilitator for Deloitte's personal tax technical academy for new graduates joining the private clients team nationally. Jack has also undertaken numerous volunteering opportunities in recent years, including providing mock interviews to local college students interested in careers in financial services and, notably, despite being a novice cyclist Jack took part in the 2019 Deloitte Ride Across Britain challenge, riding 970 miles from Lands' End to John O'Groats over only nine days to raise thousands of pounds for Deloitte Cambridge's office charity (Papworth Trust).

Meghan Watt

Director
Deloitte

11 years' experience

Meghan is a director in Deloitte's Cardiff office, having been promoted in June 2023. She originally joined Deloitte Canada after graduating from University of Waterloo with a Masters in Accountancy, before moving permanently to Deloitte UK in 2016. Meghan focusses on advising high net worth individuals on all aspects of their tax affairs, with a particular focus on C-Suite executives. She also specialises in providing tax planning and advice on reporting to founders and management teams of private companies who are navigating a transaction. She obtained her Chartered Professional Accountancy designation (CPA, CA) in 2014. Meghan has mentored her team members through promotions and continues to be a coach and mentor for various individuals at the firm across all grades. She is the social value lead for Deloitte's '5 Million Futures' team in Wales, providing social value support on bids in the Welsh market.



Eva Moynihan

Senior associate
Edwin Coe

6 years' experience

Eva trained with Edwin Coe and qualified into the Private Client team in September 2017. Eva advises on a broad range of onshore and offshore work. Eva advises high-net-worth UK and international clients, on trusts, Wills, charities and philanthropy, tax estate and succession planning. She also advises trustees on tax and legal matters, as well as UK charities by dealing with the Charity Commission and other regulators. One nominator said: "Eva is a solid and well-rounded private client solicitor but what sets her apart are her soft skills - she is excellent at communicating with intermediaries and clients and is positive and cheery even in the most pressured situations. A delight to work with."

Alex Berman

Associate director
Evelyn Partners

12 years' experience

Alex specialises in advising private clients and their businesses on the breadth of their tax matters. Alex's experience includes advising family owners of a national hospitality business on their holding structure, sale planning and estate planning, a non-UK domiciled family with a significant London real estate portfolio and a complex international trust structure, families on estate planning and investment company structures, an individual with a long standing HMRC enquiry, which was settled on positive collaborative terms and a US citizen on the restructuring and sale of a UK business and establishment of a trust and investment company structure. One nominator said: "Alex is proactive, responsive, quick thinking, approachable, innovative, engaging and compassionate and generally an all-round pleasure to work with and my "go to" for all tax considerations. A client could not be in better hands."

Emma Hosking-Williams

Partner
EY

15 years' experience

Emma has over 15 years' experience at EY advising ultra-high net worth families, family offices and family businesses, with a particular focus on non-UK domiciled individuals and overseas trust structures. Emma is a Chartered Tax Advisor (CTA) and a Fellow of the Institute of Chartered Accountants in England and Wales (FCA). Emma joined the EY financial services private client team in London as an assistant tax adviser in January 2008. Emma was quickly promoted to tax adviser later that year (October 2008), tax manager the following year (October 2009) and senior tax manager two years later (October 2011). Following a period of maternity leave, Emma returned to work and was promoted to tax director within a year (February 2017). She then spent two and a half years in EY's private client and trust team in the Channel Islands before returning to London and being promoted to partner shortly thereafter (March 2021). Emma's client portfolio is varied and she manages a number of complex engagements ranging from ultra-high net worth families with large, landed estates, to hedge fund managers and PE executives, to family offices investing in industry, to technology entrepreneurs.

Malli Kini

Director
EY

15 years' experience

Since changing careers from the medical profession in 2008, Malli has been advising private businesses and private clients for over 15 years, initially at PwC and then joining the EY Private team in London over five years ago. Initially joining the EY Private team as a senior manager, Malli was promoted to director within 18 months. He was then hand-picked for an 18-month secondment to the EY London Growth Hub, to grow EY's share of the private market. He is currently spearheading EY Private's 'one stop shop' offering for entrepreneurs which provides trusted advice to help clients both scale up and increase deal flow between the tax team and the corporate finance/deals practice. He has also taken an interest in mentoring and upskilling the firm's junior team members on mixed tax projects with entrepreneurs.

Alicia Tan

Associate
Farrer & Co

6 years' experience

Alicia is a litigator who has advised on some of Farrer & Co's highest profile and most complex international instructions relating to trusts and wills disputes. She is the lead contentious associate in a team advising the administrator on a estate which involves contested proceedings in multiple jurisdictions concerning the beneficial ownership of family assets. She also has a background in tax and works closely with the non-contentious team to find tax-efficient settlement options. She recently acted as lead associate in a high value inheritance dispute involving complex cross-border domicile issues, where tax efficiency played a significant role in achieving settlement. She also frequently acts for high profile clients, including a UHNW member of an overseas royal family, on a case relating to conflicts of laws questions relating to English law and Sharia law succession. Alicia played a lead role in a recent Farrer's video campaign 'Lasting Legacy', where she featured on the topic of mental capacity and vulnerable clients. She speaks regularly at conferences on this same topic, both in the country and overseas. Alicia is fluent in Mandarin and is also proficient in Cantonese.

Frederick Tatham

Partner
Farrer & Co

10 years' experience

Freddie advises on a broad range of private family law matters, including divorce and separation, financial claims, nuptial agreements, cohabitation and private children law matters. He specialises in high-value and complex matrimonial finance disputes, often with an international element. Freddie acts for high net worth and ultra-high net worth clients in a broad range of family law matters. He has experience of litigation at all levels, including in the UK Supreme Court, but is committed to achieving solutions outside court wherever possible. Clients appreciate his commercial approach, looking to resolve matters quickly and efficiently, and keeping costs to a minimum. He has acted for a number of high-profile individuals for whom discretion is a key consideration. Freddie has particular experience of resolving complex international financial disputes and enforcement of financial orders where one party fails to comply. He handles high-value pre- and post-nuptial agreements with care and sensitivity. He also deals with child arrangements on divorce in a manner that is consensual and child-focused. Freddie was part of the team advising Yasmin Prest in the landmark case of Prest v Petrodel in the UK Supreme Court.

Nicola Pomfret

Senior associate
Farrer & Co

14 and a half years' experience

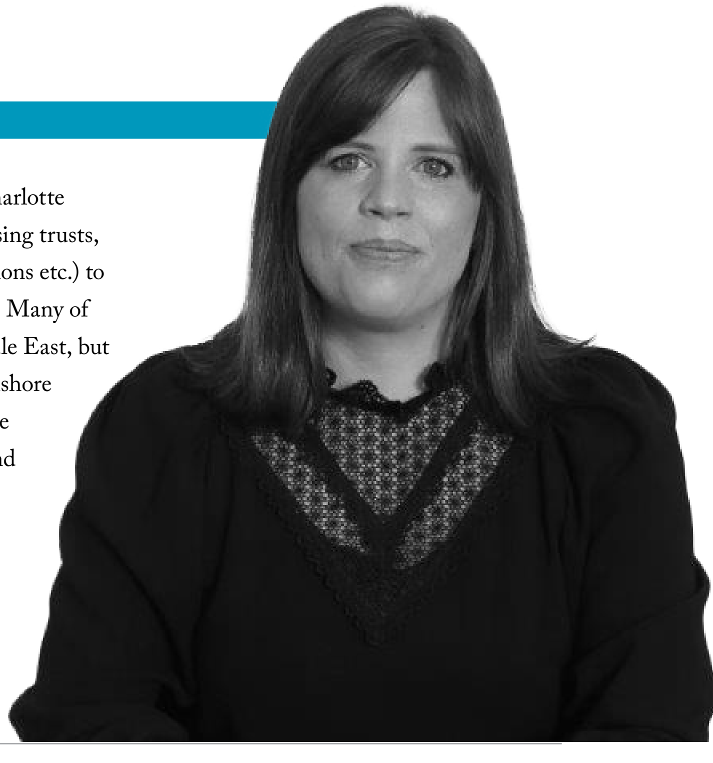
Nicola is a senior associate at Farrer & Co, having been promoted in 2019. She joined the firm from Baker McKenzie after over three and a half years. Nicola has experience in dealing with complex international trust structures and wealthy families with global touchpoints and, often, active operational businesses, including advice on family governance and associated tax issues. Nicola co-founded a popular networking series of 'Food for Thought' lunch meetings hosted by Farrer & Co, with a focus on family businesses. She also leads Farrer & Co's cross border estate expertise group, supervising and training up juniors in this important area as well as supervising a large number of trainees. She has written recent briefings on matrimonial property regimes and French cross border issues. Nicola has built up a good network of foreign lawyers and trustees to complement her London network and has recently made business development trips to the Channel Islands and Geneva.

Charlotte Evans-Tipping

Partner
Forsters

10 years' experience

Charlotte was promoted to partner in the private client team at Forsters in April 2023. She advises high net worth individuals, families, trustees, beneficiaries, family offices and private banks on family governance and succession planning, trust law and personal taxation. She is particularly interested in family governance and structuring work, which involves working closely with founders and business families to understand their ethos and long-term objectives. Charlotte devises bespoke structures (using trusts, foundations, family constitutions etc.) to achieve their succession aims. Many of her clients are from the Middle East, but this work is transferable to onshore clients. She is a member of the firm's pro-bono committee and regularly advises at pro-bono clinics, supervising junior members of the firm.



Jeremy Robertson

Partner
Forsters

10 years' experience

Jeremy was promoted to partner in Forsters' private client team in April 2021. He has experience of advising both UK domestic and international clients on all aspects of personal taxation, corporate and trust structuring, estate planning and family governance. Jeremy works with UK entrepreneurs, business owners, executives and their families on capital taxation and succession planning. His areas of specialism include the development and implementation of estate plans for both UK and non-UK resident individuals, tax planning, advising on the structuring options for acquiring UK property, creating and advising on the tax treatment of trusts and trust administration. Jeremy's practice includes family office work both in terms of supporting existing family offices and working with clients to develop and build family offices. He is also experienced in advising on the creation and on-going management of family investment, and other succession planning structures. Aside from his legal work, Jeremy co-heads Forsters' charities and community group.

Charlotte Elliott

Head of wills & probate
Hawksford

12 years' experience

A qualified English Solicitor with a broad spectrum of experience in the legal and trust industry, Charlotte is responsible for assisting clients with a variety of wills and probate services which include drafting of Jersey and UK wills, applying for local, fast track and foreign domicile probate applications, estate and delegate administration and the drafting of powers of attorney. She has a wealth of experience with clients that have challenging international and cross-border elements to their estate planning. I assist with a diverse range of private client structures with clients who are based all around the world including client relationships that require more complex structuring and seek bespoke arrangements. Together with the wills and probate department at Hawksford, Charlotte has supported the Association of Jersey Charities to launch Legacy Week in the Channel Islands, a campaign to assist and inform the public and raise awareness around leaving legacies and the importance of having a will. The campaign supported many individuals and charities in Jersey to tackle a topic that is often a taboo subject.

Stefan Le Marquand

Trust manager
Highvern

8 years' experience

After starting his career initially in Jersey and obtaining his ICSA Diploma, in December 2020 Stefan moved to London to assist in starting up Highvern's UK office – with the goal of setting new standards in the onshore fiduciary markets. During his time in London, Stefan successfully completed his studies with Christie's to be one of only a handful of trustees who are certified in advising clients on the nuances of the art & luxury asset markets. Stefan works closely with clients and families to establish and define collection goals and aims. Stefan's principal focuses range from onshore trusteeships for both philanthropic and non-philanthropic purposes, as well as assisting ultra-high net worth clients with the establishment of their onshore family offices. Recently, Stefan has been invited to speak on panels discussing how the next generation of adviser will engage with clients in the future. Stefan also maintains a keen interest in the scope of the metaverse, eSports, and digital content creators and how they will shape the world of private wealth in years to come.

Ben Naylor

Director
HSBC Trustee (C.I.) Limited

16 years' experience

Ben joined HSBC Trust and Fiduciary Services Channel Islands in December 2013 having previously worked at the trust company of Kleinwort Benson. Ben oversees the Asia team primarily establishing and managing structures for ultra-high net worth clients in Asia, which includes regular dialogue with prospects, intermediaries, and key stakeholders. He adopts a client centric approach to managing his relationships, frequently meeting clients during regular visits to Asia and is always on hand to assist on all matters relating to private wealth. A member of the Society of Trust and Estate Practitioners, and holder of the STEP Advanced Certificate in Family Business Advising.

Sam Matthews

Associate director
Intertrust Group

13 years' experience

Sam Matthews is an associate director at Intertrust Group. He works with advisers both in London & internationally to bring cost effective & pragmatic solutions to his clients. At recent roundtable discussions, Sam lead discussions on topics such as family governance issues and next gen matters. One nominator said: "Sam is very much a trusted mentor and an important senior figure within Intertrust. The company is investing in Sam and his future, this was recognized recently when Sam was chosen ahead of his colleagues for a place on the group 'fast track' leadership program. As a rising leader, we are very proud of Sam's achievements, both within the company and with the external industry recognitions that he has amassed."

Edward Mehigan

Senior manager
IQ-EQ

12 years' experience

Having spent the previous decade at Dominion in Jersey, Edward joined IQ-EQ in 2021 and is an experienced manager of teams administering private wealth structures used to hold a variety of asset classes. In his role as senior manager, he manages a team of managers and administrators in Jersey responsible for a number of different private wealth trust structures. His primary activity centres around managing the transition of clients from non-domicile to deemed-domicile and ensuring that all structuring is completed in line with tax advice prior to a change in profile occurring.

Matthew Briggs

Partner
Irwin Mitchell

9 years' experience

Matthew joined Irwin Mitchell in June 2023 from boutique firm The Burnside Partnership, where he was a partner for under two years. He specialises in multi-jurisdictional wealth structuring, international tax and trusts and worldwide estate planning for high and ultra-high net worth individuals and their families. Matthew trained and was retained as an associate at Penningtons Manches Cooper, then moved to Taylor Wessing and to Osborne Clarke before being hired by The Burnside Partnership. While his specialism lies in UK multinational private client advisory work, he brings particular experience in philanthropic and charity law to the team. Matthew was recently appointed as communications officer for STEP London Central and is a member of the Irwin Mitchell pro bono committee.

Joshua Allaway

Manager
JTC

11 years' experience

Having been primarily based in Guernsey since the outset of his career, Josh has had involvement with a variety of international clients, with a series of business ventures and interests. Prior to joining JTC in 2019, Josh's client exposure was mainly with South African clients for a Guernsey-based fiduciary company, which ultimately led to him being approached to take up a role in Mauritius in 2018. Whilst abroad, Josh was heavily involved in advising and reshaping the organisation's on-boarding and day-to-day processes, whilst also working directly with prospective clients to integrate and establish their offshore structuring with their tax advisers. After returning to Guernsey in 2019 and moving to JTC, Josh has been the lead client contact for a variety of sizeable private and corporate clients. During Josh's time with JTC he has been appointed as a line manager within the private client services team, which has entailed the monitoring and guidance of junior team members, whist being directly responsible for monitoring performance and goal setting. Furthermore, he has conducted and led various training sessions across a series of topics, including trusts, cannabis production and investment in Guernsey and changes to the GFSC handbook. Outside of Josh's time in the office he is a keen runner and has represented Guernsey at 4 previous Island Games. In doing so he has won 2 Gold and 5 Silver medals across the 100m, 200m, 4x100m and 4x400m.

Shannon Renouf

Assistant manager
JTC

10 years' experience

Shannon is an assistant manager within JTC's private client services division in Jersey. She plays a role in JTC's welcoming committee, acting in a 'buddy' capacity, as well as a 'champion' for the division in terms of project role outs and system changes. Shannon has been the face of a large East African book of businesses. Her management of the project has enabled the development and growth of some of JTC's key relationships. Following the departure of a senior colleague, Shannon had to step into a pseudo-manager role to support a large team for which she previously did not have responsibility. The role involved being the first port of call for the team, which required her to develop her own management style within a short time frame. Additionally, this included carrying out the first stage of various internal processes, liaising with clients who she previously did not have involvement, being directly involved in more complex transactions and generally providing fantastic support to the client director of the team.

Hannah Barraclough

Director
KPMG

11 years' experience

Hannah joined KPMG in October 2018 and has since had two successful promotions there, first to senior manager in 2020 and then director in December 2022. Since joining KPMG, Hannah has taken on an instrumental role in the Yorkshire shareholder team and has been key to driving the exceptional growth this team has seen over that period – with revenues more than doubling over the three years between 2020 and 2023. The recent promotion to director has seen Hannah change geographies, and move her focus on to the North West shareholder market – now covering Liverpool, Manchester and the surrounding regions. Hannah is also regularly sought out for involvement in the firm's thought leadership campaigns on her technical areas of expertise, and has written articles published both on KPMG's website and in the wider tax media. Outside of work, Hannah is a Trustee of The Menopause Charity, which works towards equality in women's healthcare during menopause and aligns with how she consistently champions equality and diversity. She also regularly sits as a Magistrate on the West Yorkshire Bench as a way to further contribute to her local area.

Masood Ullah

Senior manager
KPMG

11 years' experience

Masood began training at KPMG in 2012. He is now a tax adviser, specialising in navigating clients through complex international personal tax issues. Masood joined KPMG on the graduate program, first embedding himself in the family office & private client practice based in the Midlands, becoming a Chartered accountant (CA) and ICAS tax professional (ITP) in his junior years. Now, Masood is a senior manager based in the London practice. Masood served an instrumental role in advancing the Midlands practice's international private client tax offering. Masood's journey has led him to specialising in advising on matters relating to residency, domicile, the remittance basis, and offshore structures, with an established track record of working with high profile market leading fund managers in the asset management and private equity industry, together with global family offices. During the height of the Covid-19 pandemic in April 2020, Masood volunteered to support KPMG's efforts with the Government's Nightingale Project.

Monique Cadman

Senior manager
KPMG

10 years' experience

Monique is a senior manager in our family office and private client team at KPMG who since joining the team in 2016, has been recognised by successive promotions. She specialises in the taxation of international individuals and entrepreneurs, supporting them throughout the lifecycle of their various business interests, focusing on a variety of projects from business exits and dealing with post-liquidity events, to broader family succession and asset protection strategies. During her time at KPMG, Monique has also undertaken a two year secondment to the New Zealand member firm. Most recently Monique assumed the role of performance leader for the London team overseeing the 50 colleague team, driving excellence in client service, supporting resource requirements, driving and overseeing the team's financial results and ensuring tailored pastoral care is provided for colleagues.

Kate Stovold

Partner
Levison Meltzer Pigott

13 years' experience

Kate specialises in the resolution of private family law matters, with a focus on financial claims arising on divorce or separation. Kate's practice encompasses a variety of cases, including those with an international element, or involving complex business structures and family trusts, as well as disputes surrounding inherited wealth. Kate is also experienced in the negotiation and drafting of pre and post-nuptial agreements. Kate also advises parents in relation to disputes about the care of and financial provision for their children. Kate has experience in acting for parents who are seeking to move the family to another part of the country or abroad. At Levison Meltzer Pigott, she is the partner responsible for annual appraisals for the non-partner lawyers at the firm, and has recently overhauled the system so that the appraisal allows for careful review of both chargeable and non-chargeable time. Kate also takes the lead in terms of CSR initiatives at the firm such the recent London Legal Walk and her philanthropy goes beyond fundraising to the support of young people, especially those looking to a career in law. She is co-chair of the Wellington College Law Career Opportunity Group and features on a Women in Law panel at her former school, Woldingham.

Hannah Kalveks

Senior associate
Macfarlanes

7 years' experience

Hannah advises on a broad range of private client issues including tax, particularly tax issues affecting international clients, HMRC enquiries, asset structuring and associated governance issues, estate and succession planning, wills and trusts. She advises non-UK domiciled clients on their pre-arrival tax planning, remittance issues and trust structures, as well as advising UK clients on their tax and estate planning. She assists clients in relation to HMRC disclosures and enquires covering a variety of different and often complex personal tax issues. Hannah also advises trustees on UK tax and trust law issues, including governance issues relating to complex family asset-holding and succession structures. The majority of Hannah's work has an international element, including advising internationally mobile clients in particular based in (or with interests in) the US, Europe and Asia. The clients Hannah assists include high-net-worth individuals and families, entrepreneurs, family offices and trustees based both in the UK and elsewhere.

Mark Stitchbury

Senior associate
Macfarlanes

10 years' experience

Mark trained as a solicitor at Macfarlanes and advises on a broad range of tax, trust, estate and succession planning issues. His clients include both UK based and internationally based individuals, entrepreneurs, family offices and trustees. Mark has experience advising ultra-high net worth individuals with assets in multiple jurisdictions on complex cross-border estate and succession planning issues, along with advising family offices and trustees on the trust and tax aspects of running and reorganising multi-jurisdictional trust structures. He works regularly with the private client disputes team, typically on trust matters with a litigious element. Mark also has experience in advising on the taxation and reorganisation of structures holding UK residential property. He is a member of the Society of Trust and Estate Practitioners (STEP) and holds the STEP Advanced Certificate in UK Tax for International Clients.

Emily Kozien-Colyer

Legal director
Manders Law

8 years' experience

Having joined the firm in 2019 as a senior associate, Emily made an instant impact with colleagues and clients. She became a Resolution HNW accredited expert in 2020 and was promoted to legal director at the age of 34 in 2022 in recognition of her abilities and personal qualities. Emily's business development activity has seen her make real progress in introducing clients to the firm in the last 12 months and she is going from strength to strength in this regard. Emily, a graduate of the University of York, has wide experience in acting for both private individuals and corporate clients. Specialising in divorce and connected financial proceedings, pre and post-nuptial agreements and private children proceedings, Emily also has particular expertise in advising on applications for parental orders following international surrogacy, adding strength and depth to the firm's extensive offering. Emily is a fluent Polish speaker.

Rebecca Waterhouse

Counsel
Maurice Turnor Gardner

7 and a half years' experience

Having joined Maurice Turnor Gardner as a trainee, Rebecca was named as a counsel in 2023. As well as advising on the full range of private wealth matters, Rebecca complements her client offering by advising clients on their philanthropic undertakings, as well as immigration aspects involved when high net worth individuals wish to move to the UK with their families. Rebecca also has experience of working with partnership and LLP structures. Her current business development focus is on identifying how the firm can better serve the next generation of clients and equip them with knowledge required for navigating early adult life in the context of intergenerational wealth. Rebecca recently spoke at the latest STEP Bermuda conference, joining a panel discussing cross-border tax. One nominator said: "In addition to her highly competent legal skills, she has an excellent sense of humour (balanced with a sense of proportion and commerciality) which means that she is a pleasure to work with."

Stuart Smyth

Counsel
Maurice Turnor Gardner

7 and a half years' experience

Stuart is a counsel at Maurice Turnor Gardner and a member of the firm's private wealth team. His practice extends from advising UK families on their estate planning to international clients on cross- border tax and asset holding structures. Stuart's clients comprise families, entrepreneurs, trustees and family offices. Stuart was appointed as a counsel in 2023. One element of Stuart's practice is his focus on 'private corporate'. He is involved in leading the development of Maurice Turnor Gardner's work in the corporate restructuring of family trading and investment businesses. Stuart has also been a part of the team analysing beneficial ownership registers and led the team on the most recent Register of Overseas Entities developments.

Matthew Watkins

Director
Menzies

15 years' experience

Matthew joined Menzies in September 2022 from BDO. He started his career at Grant Thornton in 2008 and completed his training there, before moving to Moore Stephens in 2013 to broaden his experience of tax investigation work. Following the merger between Moore Stephens and BDO in 2019, Matthew was promoted to director at BDO. He now advises clients, intermediaries and his colleagues on all areas of tax disclosure and dispute resolution. Matthew has single-handedly developed the TDD service line at Menzies within a year. One nominator said his "astute mind along with his calm, empathetic and reassuring personality means he is seen as a leader in the TDD marketplace and a key leader of Menzies PCS".

Emma Geale

Principal associate
Mills & Reeve

7 years' experience

Emma is a private client lawyer who specialises in the creation and restructuring of corporate structures to hold investments. Her clients include business owners and entrepreneurs, and she often works closely with the firm's corporate team to provide pre and post-sale planning. She also works for individuals in the sports, media and entertainment sector. Emma regularly advises trustees in relation to complex trust law issues, and her work in this area saw her selected to become the first ever secondee to HMRC's Solicitor's Office, to assist with several difficult trusts matters. Emma was recently promoted to principal associate (effective from 1 September 2023), two years earlier than the average PQE for this promotion at the firm. Emma has also completed a Mental Health First Aid course and is one of the firm's Wellbeing Champions.

Annie Bouch

Managing associate
Mishcon de Reya

6 years' experience

Annie specialises in UK and international tax planning for high-net-worth individuals and trustees. She advises on a range of taxation, trust and estate planning areas, including residence and domicile, and is part of the US/UK tax and wealth planning team. Her work includes creating trusts and advising on tax and trust matters related to administering trusts. Annie enjoys implementing lifetime estate planning for families including preparing Wills, Letters of Wishes, Lasting Powers of Attorney and project managing complex, cross-border estate planning for non-UK domiciled individuals who are moving to the UK. She regularly works closely with Mishcon de Reya's family, private wealth disputes, immigration and real estate teams. Annie was promoted to managing associate in April 2023. She is a trainee supervisor, and a supervisor for internal and external vacation scheme students. Annie also plays an important role in the firm's graduate recruitment programme and has appeared on the Mishcon Shapers podcast discussing what is expected of a trainee. Annie is as much a team player in the office as she has been on the netball court, she captained the Mishcon netball team for five years and led the team to a league title for the first time in over a decade.

Alexander Hawkins

Senior associate
Mourant

8 years' experience

Alexander is a senior associate in the private client and international trusts practice of Mourant in Guernsey. He provides advice to trust companies, international families and high net worth individuals (HNWs) about wealth structuring and asset protection. He also provides advice in relation to contentious and non-contentious trust and succession matters. He joined Mourant Ozannes in 2020, having previously practised as a solicitor in Australia for Cooper Grace Ward. He is also a member of the Guernsey International Legal Association, Queensland Law Society, and Society of Trust and Estate Practitioners. In 2023, Alexander has chaired a session at Mourant's Channel Islands Trust Forum and also participated in the We Are Guernsey roadshow in London. Away from work, Alexander participates in his firm's touch rugby team, and he again ran the Guernsey marathon this year on behalf of the firm.

Carmen Mills

Trust manager
Ocorian

16 years' experience

Carmen's work encompasses instructing and liaising with several leading firms on tax matters (both planning and reporting) with a particular focus on UK IHT, capital gains tax, income tax, ATED and non-resident corporation tax. In the corporate space, in addition to administering companies Carmen has assisted with incorporating, restructuring and liquidation of offshore companies. Qualified with the STEP Diploma, Carmen plays a key role in the administration of several of Ocorian's largest clients. One nominator said: "Carmen is a real asset to the firm and is an extremely safe pair of hands. Carmen provides an extremely responsive service. Both clients and advisors enjoy dealing with Carmen and she receives a lot of praise for the quality of her work. Carmen's approach and experience enables her to identify key issues at an early stage and provide a superb service to her clients."

Sophie Denman

Managing associate
Ogier

8 years' experience

Sophie is a Guernsey-based STEP qualified private client lawyer with experience in advising on Guernsey and BVI private wealth matters, including structures and succession. She advises on numerous large structures and is the trusted adviser for a variety of clients.

Sophie has also advised on a number of novel structures, including crypto-currency trusts. In addition to this, Sophie is described as a "valued member" of Ogier's diversity and inclusion network. Passionate about supporting the firm in its commitment to diversity, equity and inclusion, Sophie has made numerous suggestions and contributions. One nominator said: "She is committed to ensuring Ogier continues to be a great and progressive place to work for its staff."

Samantha Hoare

Managing associate
Ogier

11 years' experience

Samantha is a managing associate at Ogier. She has been at Ogier for around a year, having joined from Carey Olson after almost 14 years, where she was latterly a senior associate. Since joining Ogier, Samantha has taken on day-to-day operational leadership on a number of key matters. She has advised on complex contentious trusts matters, on sanctions issues for trust companies within Jersey, and otherwise on the variety of contentious private client issues that arise in the offshore arena. Samantha is an advocate of significant standing and has appeared in Court on interlocutory matters in the largest trust case that our team are involved in. Beyond the key role she plays in client-facing work, Samantha has taken an active role in mentoring junior associates and in promoting career development amongst those she supervises and delegates to. One nominator said: "The conscientious and collaborative approach she adopts is a crucial part of our 'people first' approach."

Nick Manners

Partner
Payne Hicks Beach

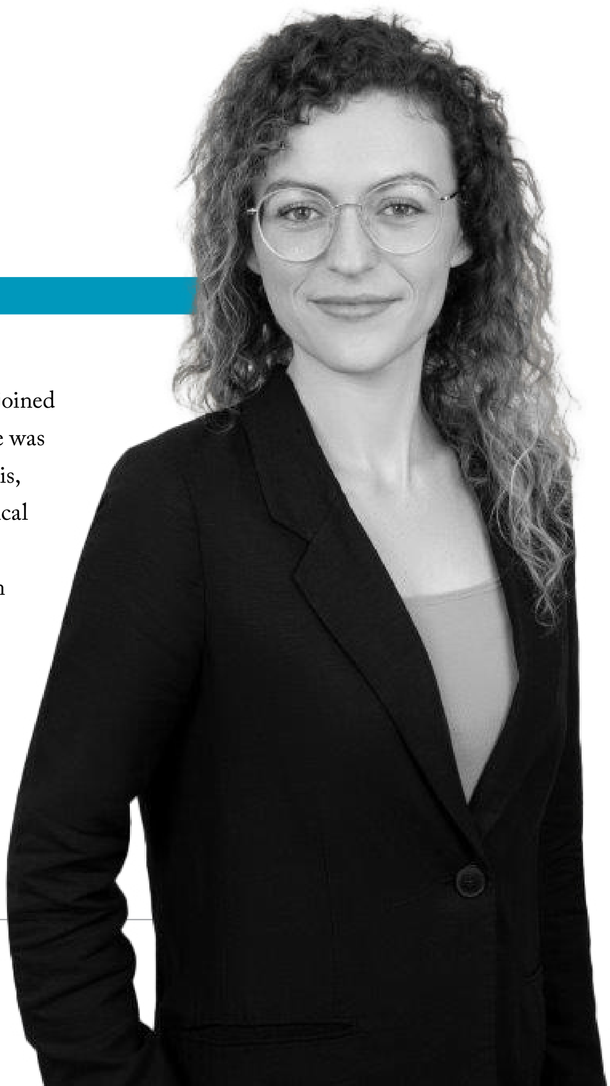
13 years' experience

His skills have been recognised within the firm as he was promoted from senior associate to partner within three years and was made an equity partner a year after that. At the age of 38 he is being considered for a senior management position ahead of many of his peers. One nominator said Nick's "knowledge of the law is unrivalled and he has a great commercial head. As a partner he is very invested in the team and bringing everyone up with him. He invests time in giving constructive feedback and is trusted by his peers and those who work for him alike."

Zoe Fergus

Senior manager
Praxis

7 years' experience



Zoe joined just under a year ago in Praxis' London office as a senior manager. She joined from Blevins Franks where she was a trust officer for over one year. Before that, she was an administrator at Crestbridge for around five and a half years. Since joining Praxis, she has taken on complex clients that need careful management from both a technical and relationship perspective. Zoe has also assisted in the roll-out and delivery of Praxis' Register of Entities work. One nominator said: "She has played a key role in developing relationships with several key intermediaries - especially Coutts bank where she has helped us build a strong relationship. To have achieved all this in a new role whilst coming in as a senior manager has been very impressive to see."

Akeem Bolaji

Tax manager
PwC

10 years' experience

Also named as an *eprivateclient* Top 35 Under 35 last year, Akeem joined PwC as a tax manager in 2022. Before joining PwC, he worked for Azets as a tax consultant and latterly tax assistant manager. Before that, he was a private client tax associate for RSM UK. He has also worked for fellow Big Four firm EY. At EY, he was as a remediation analyst, a personal tax assistant and a tax senior client executive. Akeem is also Association of Taxation Technicians (ATT) qualified and a Chartered tax adviser.

Natasha Warren

Senior tax manager
Rawlinson & Hunter

10 years' experience

Natasha joined Rawlinson & Hunter in 2017 as a private client tax consultant and has progressed through the grades to the senior manager role. Natasha was selected to be the technical PA to Mark Harris then one of the firm's senior partners (and now the senior partner). She was also the only person invited to perform the role for a second year. Mark Harris said: "Natasha was perfection in the role and a joy to work with." She also uses her experience to coach and foster the younger R&H team members through their exams. Natasha is also regularly consulted by her peers on complex technical issues. In summary, one nominator said: "The technical qualities and client handling skills which Natasha has developed, along with her natural integrity and her maturity, have placed her on track to become a future big hitter in the private client world."

Stephanie Court

Tax director
RSM

11 years' experience

Stephanie is a Chartered tax adviser specialising in trusts and estates, advising on UK and offshore matters. She has been at RSM for six years, currently working as a private client tax director. Sophie initially joined as a tax manager in 2017 from Wilkins Kennedy, where she was a private client tax manager for over a year, before becoming an associate director the following year. She joined the firm. She has also worked in other tax-related roles at HSBC and EY. She manages a diverse range of complex projects for her clients who include entrepreneurs, UK and non-UK individuals, their families and trusts and her knowledge extends across a wide variety of private client issues. Stephanie is also a member of CIOT and STEP.

Steven Coelho

Director
Saffery

13 years' experience

Steven is a director, team leader and line manager within Saffrey's tax advisory team. He joined the firm in 2018 from Rawlinson & Hunter as a private client tax manager, before being promoted to senior tax manager in 2019, and finally to director in 2021. He currently manages a diverse portfolio of international clients, including family offices, trustees and ultra-high net worth individuals. In addition, he is often asked to utilise his skills to assist with other clients of the firm. Steven has met with multiple leading King's counsel on technical matters since joining, in particular, with reference to the anti-avoidance provisions applying to non-UK companies and trusts. Steven acts as an ICAEW Counsellor to a number of graduates and provides studying assistance, bi-annual ethics review and performance and development reviews setting SMART objectives.

Matthew Gilligan

Associate director
Saffery Trust

16 years' experience

Matthew is an associate director at Saffery Trust. He joined over two and a half years ago from Louvre after over nine years, where he was latterly also an associate director. He got his start in finance during the 2005 summer holiday at Kleinwort Benson, where he was a banking administrator. He went on to work for Butterfield Bank and Investec. He specialises in risk mitigation and family governance, including contentious matters. He claimed to "have always had an aptitude for problem-solving" and prides himself on "keeping a cool head in challenging situations". He added: "It's hugely important to me to be a helper both professionally and personally, building quick rapports with an understanding of what is truly important to other people."

Michael Rutili

Partner
Stephenson Harwood

12 years' experience

Michael, a trusted adviser to private clients, their families and businesses, is a partner at Stephenson Harwood. He has experience advising on a wide range of UK and international matters involving tax, estate planning and succession issues. Michael's practice straddles both advisory and litigious angles. His non-contentious practice involves advising individuals and families relocating to, leaving or with interests in the UK on the most appropriate and efficient tax and estate planning. One nominator said: "His understanding of the most common issues and criticalities in the various jurisdictions involved (especially European ones) enables him to better understand clients' needs and concerns and work seamlessly with the other advisers involved." The second main pillar of Michael's practice is of a more contentious nature, involving disputes involving entities and structures (trusts, foundations, companies), successions and tax matters. Michael also takes a pre-emptive approach, stress-testing clients' wealth planning structures and affairs in order to reduce the risk of future litigation.

Gareth Walliss

Partner
Stevens & Bolton

14 years' experience

Gareth joined Stevens & Bolton as a partner in May 2022. Prior to joining he spent 13 years practising with two city firms (Macfarlanes and Charles Russell Speechlys) and a further year with national law firm, Shoosmiths. Gareth deals particularly with the creation, administration and rearrangement of trusts and other asset holding structures, to ensure tax efficiencies and inter-generational security. He is also frequently instructed by the trustees of employee benefit trusts and death in service schemes, and regularly works with our private wealth disputes team to deliver tax and structuring advice in the settlement of claims. Gareth's clients value his ability to rapidly assimilate their affairs, become their trusted adviser and guide them through the decisions they need to make. Gareth was named as an *eprivateclient* Top 35 under 35 in 2015, 2016 and 2017,

Kate Silbermann

Senior counsel
Taylor Wessing

13 years' experience

Kate is a Senior Counsel within Taylor Wessing's private client group specialising in contentious trusts and estates work. Kate has extensive litigation experience in acting for trustees and beneficiaries in England, Jersey and other offshore jurisdictions including Bermuda and the Bahamas. Kate also has considerable civil fraud, asset tracing and recovery experience and she assists clients with alternative dispute resolution strategies, including mediation. Kate has recently developed an expertise in dealing with insolvent trust structures following her work on the precedent setting Z Trust case. Kate is also leading the development of the firm's matrimonial sector. She routinely advises Trustees in the context of a divorce and was the managing associate in relation to a complex matrimonial financial remedy proceeding securing a large lump sum award for the client. That case involved international asset tracing and attacking an alleged trust structure. Kate is also part of the firm's Healthy Trusts initiative, leading on complex risk reviews for key trustee clients.

Robert Gibson

Senior associate
Taylor Wessing

12 years' experience

Robert is a senior associate in the private client team at Taylor Wessing. He represents trustees and ultra-high net worth individuals on a range of trust issues in litigation in England & Wales and offshore jurisdictions such as Jersey, Hong Kong and the Bahamas. Robert has specialist experience in arbitration work within the contentious trust world. He is the managing associate on one of Taylor Wessing's largest and most complex cases. In this case, he manages a team of associates and leading and junior counsel teams over six different strands of litigation, each in a different jurisdiction. Robert is also part of the firm's healthy trusts risk review initiative whereby he assists trustees in risk assessments of new or problem trust structures as well as trustees who purchase books of business.

Caroline Belam

Partner
The Burnside Partnership

14 years' experience

Caroline advises both UK and non-UK based clients on a broad range of private wealth matters, including the preparation of UK tax efficient Wills, advising on UK personal tax and estate planning, and the preparation and registration of lasting powers of attorney. Caroline's client base includes high and ultra-high net worth individuals, trustees and family offices. She has particular experience in advising on private client matters with an international element, including cross-border personal tax and estate planning matters and complex offshore and onshore trust and corporate structures. Caroline has a particular focus on advising non-UK domiciled individuals and families on their wealth and succession planning. Caroline also regularly advises non-UK based clients on UK private client matters, including tax planning for clients moving to the UK and suitable holding structures for UK assets. Caroline joined The Burnside Partnership in May 2023. Prior to that, Caroline worked at Taylor Wessing.

James Netto

Partner
The International Family Law Group

11 years' experience

James specialises in all areas of children law, with particular expertise in international children matters. He is a Solicitor Advocate, and regularly conducts his own advocacy in the Family Court and also in the High Court. James is highly experienced in cases concerning the international movement of children. He is a specialist in international parental child abduction cases and is regularly instructed by the parents and children within the UK and abroad, as well as by the Central Authority. In a series of firsts, James was involved in the first 1980 Hague Convention child abduction case between Japan and the UK, the first cases concerning the inherent jurisdiction and the 1996 Hague Convention to reach the UK Supreme Court, the first appeal case to concern the interpretation of Brussels II Revised enforcement provisions, and the first reported cases of children being returned to Algeria and to Sudan. He has also acted for clients in many high-profile and widely reported appeals, interventions and committals. James is much in demand as a speaker at seminars and conferences both within the UK and abroad. He is one of just a handful of lawyers admitted to Bar of Akrotiri and Dhekelia, having appeared in what is thought to be the first international children case in that jurisdiction. James is a Resolution Accredited Specialist in Child Abduction and in European and International Law and is fluent in Spanish and French, with a high level of German.

Annaliese McGeoch

Senior associate
Walkers

7 years' experience

Annaliese is a senior associate for Walkers in Guernsey and a Guernsey Advocate. She advises on corporate M&A and restructuring matters, investment fund launches and capital raises for both open and closed ended structures, downstream private equity matters, and provides regulatory advice to structures and individuals including investor issues, structuring and regulatory compliance. She has been in private practice in Guernsey since 2016, and prior to qualifying as a lawyer she worked in KPMG's Channel Islands offering. Annaliese co-founded the Guernsey Institute of Directors' Next Gen Forum and sits as vice-chair on its Next Gen Committee. Prior to joining Walkers' Guernsey office in June 2023, Annaliese trained and qualified as a Guernsey Advocate and before that, as an English Solicitor with offshore law firms in Guernsey. In her previous firms she also advised on finance including securitisation, HNW real estate finance and both NAV and sub-line fund financings, as well as private client and trusts advice and establishment.

Jack Martin

Associate
Wedlake Bell

6 and a half years' experience

Jack is an associate in Wedlake Bell's private client, philanthropy and art & luxury teams. He was a key member of the team that advised and put in place a structure to help set up the charity, Svitlo Education which focuses on aiding those affected by the Ukraine conflict. The charity offers online education, English language classes, school scholarships, and educational resources to children who remain in Ukraine and those who have been displaced. Jack has a particular interest in art collections and cultural heritage and has a diploma in Art Law from the Institute of Art & Law. One nominator said: "He is one of those rare breed of private client solicitors who combines his expertise with a personable nature. Jack is definitely a star of his generation and very deserving of recognition."

Tamara Wakeford

Associate
Wedlake Bell

6 years' experience

Tamara qualified as a solicitor in 2019 and immediately joined the art & luxury law practice at Charles Russell Speechlys having trained at Freshfields Bruckhaus Deringer from September 2017 to August 2019. She demonstrated a keen interest in litigation, having acted for Sotheby's while at Freshfields on a fascinating case concerning a purported fake Frans Hals' portrait. In late November 2022, the team were headhunted by Wedlake Bell to establish their art & luxury practice. One nominator said: "She promises to have a flourishing career and we have no doubt she will remain on this trajectory given her work ethic, affable character and wish to constantly learn and improve. Art law is not suited to everyone, not least because the subject matter tends to create an emotionally charged client that can be difficult to please. Tamara has shown she is adept in managing those relationships and ensuring the clients feel suitably supported and well advised."

Joshua Ryan

Associate
Weightmans

8 years' experience

Joshua is an associate in the tax and private client team at UK law firm Weightmans. Joshua advises individuals, families, and trustees on a range of private client matters, generally on issues related to the growth, structure, and devolution of personal and business wealth. This includes advising on succession, wills, inheritance, trusts, and tax and estates planning. Joshua particularly enjoys advising on matters that involve an international element, having also studied French Law at Grenoble University, France. He frequently advises clients who are not resident or domiciled in the UK as well as those that are based in the UK but hold assets abroad. One nominator said: "He is talented, its as simple as that. His name seems to pop up in lots of places and he is dealing with some really very good clients. I know that he is tipped for great things by his team and I can see why. Amongst the lawyers that I know at his level he is standing ground with the best and he is someone that I am glad to have a relationship with and to work with."

Hannah Wailoo

Partner
Withers

15 years' experience

Hannah is a partner in the private client and tax team in London and co-head of the Middle East group. She is a specialist succession and personal tax planning lawyer whose clients include domestic and international individuals, families, trustees and family offices. Hannah provides tax efficient and estate planning solutions, with a particular focus on international families with a presence in the UK, or who are investing into or relocating to the UK. Her key specialism is UK real estate ownership for international families and investors, where she provides inheritance tax and other personal tax mitigation advice for real estate investment to the UK and for existing ownership structures. Hannah co-heads our Middle East group and many of her clients live in or have a connection to the Middle East region. Hannah joined Withers in 2021 from Towers & Hamlins.

Jennifer Dickson

Partner
Withers

13 years' experience

Promoted to partner in July 2022 in Withers' divorce and family team, Jennifer's practice encompasses financial remedy claims (both for married couples and unmarried parents), disputes about how children should spend their time, relocation cases and prenuptial and postnuptial agreements. Many of her cases have an international dimension or involve trust interests or complex corporate structures, and clients come from many walks of life - often they are high-net worth individuals and sometimes in the public eye, wishing to stay out of it. Jennifer has been involved in supporting clients on a number of high profile cases - she worked with Diana Parker in advising hedge fund manager, Sir Chris Hohn, on the biggest divorce in the English courts, successfully protecting his business from division and defending his wife's claim for 50 percent of the assets.

Fiona McLaughlin

Managing associate
Womble Bond Dickinson

10 years' experience

Fiona is a managing associate in Womble Bond Dickinson's private wealth department. Fiona trained with the firm and qualified in September 2013. She has since risen through the ranks, being promoted to associate in May 2017 and then managing associate two and a half years later in November 2019, just after giving birth to her first child. Fiona operates a novel practice in that, having begun her legal career advising in relation to non-contentious estate planning matters, she now operates a dual-practice and also advises our clients on trust, inheritance and estate disputes. As a result, her sector experience and breadth of knowledge is varied and vast and she successfully balances the technical expertise with the softer skills necessary for dealing with difficult family situations. In relation to her general estate planning practice, Fiona advises wealthy individuals and families on their wealth structuring and business succession planning, also acting as the trusted legal adviser for inter-generational families and for trustees of high value trusts. Her experience covers a broad range of private client areas, including Wills, trusts, Lasting Powers of Attorney, inheritance tax planning (including pre-sale tax planning for business owners), and Court of Protection gift and statutory Will applications. On the contentious trust and estates side, Fiona advises on a full range of issues that can arise in contested, high value and complex trusts and estates (both domestic and offshore), representing individuals, families, trustees, charities and financial institutions.

Joe Kelley

Managing associate
Womble Bond Dickinson

13 years' experience

Joe advises clients on managing their way through a wide range of wealth management disputes, including complex disputes about trust, inheritance and tax. He primarily advises HNW individuals, but has also acted for significant charities and is carving a growing niche advising major professional indemnity insurance companies on the defence of claims relating to private client issues. Despite the firm's panel appointment with various insurers, they are now singling Joe out as the person they want to act for them due to his strong reputation for securing favourable results. He is a member of ACTAPS and the Contentious Trusts Association, and a regular participant in their seminar program and other business development events. Joe also has a significant role as a mentor to a number of junior solicitors in the team, and always goes the extra mile to ensure their development. Outside of work Joe enjoys playing and watching sport (especially cricket), working as a governor at the Northern Counties School in Jesmond – a specialist education provider for children with additional needs – and caring for his family, including son Lucas who has significant additional needs.

Chelsea Martin

Partner
Wrigleys

9 years' experience

Promoted to partner this year, Chelsea primarily advises high net worth clients on lifetime planning using trusts and outright gifts, and she advises business owners on their succession planning and the availability of inheritance tax reliefs. She acts for multiple generations of various client families and is often referred by clients to business associates and friends. Other firms of solicitors frequently refer matters involving corporate transactions to Chelsea where specialist trust, estate planning or probate advice is required at short notice. She is also a leading member of the department's precedents committee and has been heavily involved in updating the team's more complex Will precedents. Chelsea regularly writes articles to share updates with clients and other professionals and records "Law in Under a Minute" episodes with a focus on trusts and succession planning.

On Thursday 21 September, eprivateclient held a champagne reception, which was kindly sponsored and hosted by Cazenove Capital. The event brought together representatives from the 2023 eprivateclient NextGen leaders list, as well as prominent private client professionals from the legal, trust, and accountancy sectors

Yousafa Hazara, associate, Irwin Mitchell, Ella Brown, portfolio manager, Cazenove Capital, Harriet Gerard Leigh, associate portfolio manager, Cazenove Capital, Matthew Briggs, partner, Irwin Mitchell and a 2023 eprivateclient NextGen Leader & Ethan Almond, reporter, PAM Insight

Araminta Emery, wealth planner, Cazenove Capital

Oliver Morrison, portfolio director, Cazenove Capital

Jonathan Brecker, director, Alvaraz & Marshal Tax & a 2023 eprivateclient NextGen Leader

Neil Long, head of private wealth, Womble Bond Dickinson & Will Sidery, senior editor, PAM Insight

Helen MacLeod, senior associate, Burges Salmon & a 2023 eprivateclient NextGen Leader

Anna Boucher, senior associate, The Burnside Partnership

Kellie Sherwill, advocate and associate, Carey Olsen & a 2023 eprivateclient NextGen Leader

Kate Leppard, head of private clients, Cazenove Capital

Katie Royals, managing editor, PAM Insight

Rachel Sutton, portfolio manager, Cazenove Capital & Elisha Backhouse, director, PwC

Isabelle Denison, senior paralegal, Manders Law

Gabrielle Colombaioni, senior tax adviser, Charles Russell Speechleys & a 2023 eprivateclient NextGen Leader

Emily Kozien-Colyer, legal director, Manders Law & a 2023 eprivateclient NextGen Leader

Jack Barstow, associate director, Deloitte & a 2023 eprivateclient NextGen Leader

Zoe Fergus, senior manager, Praxis Group & a 2023 eprivateclient NextGen Leader

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