

# LEGAL AND TAX ADVISORY



STONEHAGE  
FLEMING

NOW AND FOR FUTURE GENERATIONS

## CLEAR COUNSEL IN A COMPLEX WORLD

Stonehage Fleming Law comprises a collaborative group of legal practices across Stonehage Fleming which brings together a team from diverse jurisdictions and disciplines, to provide general counsel services to international families.

Our focus is on what matters to you, whether that is building a legacy for future generations, as custodians of a family business or making a positive impact on society.

Our legal practices are based in six of our offices and in five jurisdictions, namely the United Kingdom, the United States of America, Monaco, Isle of Man and South Africa, but we have an extensive network outside these jurisdictions to support our clients from anywhere.

We understand the issues that you face every day and advise on a wide range of matters from long-term tax planning and structuring solutions to ensuring that your legal interests are protected in transactions and investments.

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## HOW WE WORK WITH CLIENTS

We aim to make the complex simple. We have supported international families for over forty years and have particular expertise in assisting clients to formulate efficient, cost effective strategies to protect and pass on their wealth.

We work with clients to identify the big picture issues, helping you answer important questions such as:

- ▶ Who will benefit from my estate when I die?
- ▶ Who will manage my affairs if I lose mental capacity?
- ▶ What is the best way to make a desired investment?
- ▶ How do I negotiate the best deal terms?
- ▶ What are the tax and other implications for me or my family if we move to another jurisdiction?
- ▶ How should I go about rewarding employees in the business I own?
- ▶ How can I protect our family's wealth in the event of divorce, insolvency or other claims?
- ▶ What are the implications for me where I receive a benefit from a family structure?
- ▶ What advice do I need (and how do I find someone to advise me)?

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## OUR APPROACH

All families are different and we first ensure that we understand your objectives, attitudes to risk and lifestyle needs. Once we understand your goals, we can better discuss structuring and tax solutions to achieve those goals.

However you wish to work with us, you will always have a principal point of contact. This makes your relationship with us simple and straightforward, and ensures that the management of individual aspects of your family's affairs is always considered in the context of your broader arrangements. Areas on which we regularly advise include:

- ▶ Legal advice on investments
- ▶ Multi-jurisdictional tax planning
- ▶ Structuring joint ventures
- ▶ Trustee advice
- ▶ Family governance
- ▶ Philanthropy and charitable giving
- ▶ Litigation support
- ▶ Share schemes and employee benefits
- ▶ Commercial law
- ▶ Trust implications on divorce

## CONTACT US

If you think we may be able to help you and your family please contact us for a discussion.

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