

## Samantha Morgan

### Consultant Member

**Offices:** London

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**Education:** University of Wales, College of Cardiff, LL.B Hons

**Admitted:** England and Wales, 1993

**Year joined:** 1996

**Year became partner:** 2000



### Overview

Samantha works with a number of international family offices, advising on all aspects of UK tax and fiduciary issues and co-ordinating foreign tax and other advice for the family office and family members.

Samantha has advised a number of offshore and onshore jurisdictions on legislation relating to trusts, private trust companies and family offices.

Samantha advises trust companies, banks and investment houses on fiduciary and tax issues, which has included such areas as the structure and tax treatment of investments and trust structures (including EBTs) and drafting standard trust and other related documentation.

Samantha also works with individuals advising them on their personal tax issues (dealing particularly with US/UK tax issues).

Samantha is listed in the Citywealth 2010 Leading Lawyers List as a prominent figure.

### Highlights

Samantha recently carried out a review of a complex trust structure, advising on the UK tax issues and fiduciary issues, co-ordinating with other advisers outside the UK. Following completion of the review, Samantha worked with the family and the trustees to implement the recommendations made in that report.

Samantha worked with a team in The Bahamas in a review of their private trust company legislation.

Samantha led a team preparing standard trust documentation (and related subsidiary documentation) for use by a bank owned trust company where the intention was to enable the settlor to obtain key powers over investment decisions without giving rise to UK tax problems.

### Publications and speaking engagements

Samantha is part of the editorial team of Practical Trust Precedents, Practical Will Precedents and International Trust Precedents.

### Memberships

The Society of Trust and Estate Practitioners.

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