

Samantha Morgan

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Samantha is a consultant in the private client and tax team.

She 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. she also 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).

Track record

Complex trust structure

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.

Private trust company legislation

Assisted a team in the Bahamas in a review of their private trust company legislation.

Trust documentation

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.

Admissions

England and Wales, 1993

Education

University of Wales, College of Cardiff, LL.B Hons

Languages

English

Memberships

The Society of Trust and Estate Practitioners

Key dates

Year joined: 2012

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