


Sophie Le Breton


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Sophie is an associate in the private client and tax team.

Sophie advises clients on a range of wealth planning matters impacting successful individuals and their families. She advises high net worth individuals in respect of their tax, trust and estate planning, including clients who are either non-UK domiciled or non-UK resident, or both.

Much of Sophie's work involves advising UK resident and domiciled individuals in respect of their estate and lifetime tax and succession planning, including the preparation of Wills, Trusts (including Life Insurance Trusts) and Lasting Powers of Attorney and advising on the tax and practical implications of passing assets down to the next generation during clients' lifetimes. Sophie has also put in place a number of Family Limited Partnerships, which enable families to pass wealth down to future generations, while the wealth creators maintain control.

Sophie also advises clients who are intending to become UK resident, in relation to the statutory residence rules, the remittance basis of taxation and appropriate holding structures for UK property.

Track record

Transfer of shareholding

Advising on the transfer of a substantial shareholding in an AIM listed company into a trust and assisting with the associated regulatory approvals.

Freezing order

Applying to the Supreme Court of Bermuda for directions in relation to a worldwide freezing order which sought to include trust assets.

Family Limited Partnerships

Creating Family Limited Partnerships as an effective succession planning tool which enable control to be preserved by the wealth creators.

Tax efficient ways to exit businesses

Advising on the most tax efficient ways for director / shareholders to exit businesses, including in contentious circumstances.

Drafting operational manual

Drafting an operational manual for a complex offshore trust structure with various business investments, where the settlor was UK resident, but not UK domiciled.

Offshore trusts tax consequences

Advising on the tax consequences of offshore trusts investing into UK start-ups.

Education

Newcastle University, LLB (Hons)

University of Law, LLM

Languages

English

Key dates

Year joined: 2016

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