



Trust management services

The managing of trusts can often be complex and time consuming.

Our specialist trusts team can advise you on all aspects of setting up trusts and administer them on your behalf. We currently look after more than 300 trusts – advising, handling administration and dealing with compliance issues.

Our service includes:

- maintenance of trust accounts
- preparation of annual statements
- arranging tax returns
- providing updates on balances
- regular reviews
- advising on trustee duties and requirements
- advising on income tax, capital gains tax and inheritance tax issues
- making income and capital distributions
- tax compliance including annual trust income tax returns, Inheritance tax returns and arranging tax payments
- winding up the trust

In addition to our trust management role, Brachers Trust Corporation Limited can be appointed as a professional trustee at no extra charge.

Brachers Trust Corporation Limited (BTC)

BTC is an efficient and cost effective way of appointing a professional trustee of your family trusts and can be appointed solely or with other trustees. Continuity is assured as no issues arise from the absence, death or retirement of an individual trustee.

Brachers will continue to be engaged to provide legal services to BTC. A specialist lawyer will continue to act for you, and any other co-trustees, through BTC, providing personal contact with a known individual.

There are no additional charges for BTC acting compared with an individual partner in this firm. Our fees will be paid in the normal way from the trust fund.

If you would like any further information on trusts or Brachers Trust Corporation Limited, please contact Justine Sloover on 01622 776436 or at justinesloover@brachers.co.uk.



Trust management services

“Working with them feels relaxed and comfortable and they all work together to a high standard in which the client comes first.”

Chambers UK, 2015



Justine Sloover
Associate

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Justine is an experienced senior trust manager with a wealth of knowledge which has been gained over 25 years in trust management.

Expertise

- Management of Trusts
- Advice to Trustees
- Trust Taxation
- Trust Compliance
- Professional Trustee Services

Profile

Justine has an in depth understanding of the various types of trusts and related tax issues including Inheritance Tax, Capital Gains Tax and Income Tax. She also deals with the completion of all related tax returns, inheritance tax accounts and the audit of annual trust accounts.

She advises trustees on their obligations and provides guidance and assistance as required. Justine ensures that all trust formalities are adhered to within the appropriate deadlines and that all relevant trust documentation is completed. Trust matters are also kept under review to ensure that these are being dealt with in accordance with current legislation and are compliant.

Justine has experience of dealing with trusts of various levels of complexity and value including high net worth family trusts. Justine also has some offshore trust exposure and has been involved in successful negotiations with HMRC regarding tax matters.