clarke willmott

Executive Wealthcare

Simplify your life and focus on what matters most

Great service... Great people...

clarkewillmott.com

> “Clarke Willmott is **very professional and has an excellent work ethic. All details are explained in clear language.**”

The Legal 500 2020

What is
Executive Wealthcare?

Keeping on top of your legal and business affairs can seem like a tall order, especially as our lives become ever more complicated and frenetic. Dealing with more paperwork or online systems is often the last thing you want to do after a busy day and it’s easy to lose track of, or overlook, important details.

Clarke Willmott’s Executive Wealthcare service can help you to organise your affairs in the most comprehensive and efficient way possible. Our team will review your circumstances and provide bespoke, proactive planning advice on how best to manage the legal side of your finances to mitigate risk and preserve wealth for future generations. As well as ensuring that your affairs are put in optimum order, we will also save you time; freeing you up to concentrate on the other important things in your life.

If you are a business owner and employer then Executive Wealthcare can benefit you personally. It can also be offered to your executives and/or employees as an employee benefit, giving them peace of mind that their legal and financial affairs are being professionally managed. The net result for you is a more engaged and productive workforce.

Bespoke legal and tax planning

How Executive Wealthcare **can help?**

Executive Wealthcare is designed to help:

- **Entrepreneurs, professionals and executives and all those integral to the running of a business.** We can help ensure that all your legal and financial affairs are fully in order and help to manage and preserve wealth through proactive planning.
- **Employees.** We can help you with lifetime planning and advise you on employee benefits. This may involve one-to-one meetings, group seminars, written guidance and /or a telephone service.
- **Employers.** We can offer our services to employers as an employee benefit.
- **Business owners** We can advise and support on business transactions and work with families and partnerships on succession matters (in addition to the above).

We recognise the synergy between Executive Wealthcare and financial advice and as such, our advice may require the input of an independent financial adviser (IFA) to ensure that any wider financial planning is taken into account. If an IFA needs to be appointed then we are well-placed to make the necessary recommendations to help you to make an informed decision as to who to appoint.

We deliver this service with **efficiency & flexibility**

What are our **core services?**

We can advise on:

- Business succession planning
- Generational involvement and planning
- Lasting powers of attorney
- Wealth structuring
- Estate planning
- Family & divorce
- Tax planning and compliance
- Trust and foundation services
- Philanthropic planning
- All aspects of property law including tax

If any of our advice needs to be implemented then our team of specialist solicitors can do the necessary drafting.

A comprehensive legal service **to meet your needs**

Your
next step

If you are interested in learning more about how our Executive Wealthcare service can help you, please contact either Paul Davies or Georgia Collier via the details below to arrange a free consultation.

The initial consultation can be conducted via a face-to-face meeting at one of offices or at your home or workplace. We also offer consultations via telephone or Skype. The objective of the consultation is for us to understand your needs and establish how we can best support them. This will enable us to formulate a bespoke wealth planning strategy for you.

You will be assigned a single point of contact for all ongoing work.

We provide you with a **single point of contact for all on-going work**

Paul Davies, Partner (North)
t: 0345 209 1783
e: paul.davies@clarkewillmott.com

Georgia Collier, Solicitor (South)
t: 0345 209 1446
e: georgia.collier@clarkewillmott.com

Our
Private Wealth team

For over 100 years, we have specialised in helping our clients and their families to organise their affairs and finances to provide financial security and an enhanced quality of life in the future.

Our friendly, straightforward approach and exceptional service has been rewarded with the Law Society's Lexcel quality mark for client care standards. We take the time to get to know you so that we understand the issues that matter to you and your family.

As well as receiving support from our legal and personal tax specialists on all your private wealth needs, you will also be able to draw on the expertise of our Corporate, Employment and Family teams. This includes advice on any international/cross-border issues.

"They are highly efficient and diligent"
Chambers UK 2020

About Clarke Willmott

With seven offices throughout England and Wales, Clarke Willmott is a national law firm with a local presence. We provide our clients with a winning combination of high quality national expertise and in-depth regional knowledge.

Our solicitors work with an extensive client base of private businesses, sole traders, public bodies, high net worth individuals and charitable organisations, and can advise on almost every aspect of the law.

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Get in touch:

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Offices

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