Financial assets in private client disputes

Private client lawyers need to engage the right financial experts so that their clients can benefit from immaculate, jargon-free advice and reports.

Our diverse offering as a business means that we draw on firm-wide strengths in forensic accountancy and valuations, tax, pensions and investment management to provide a fully comprehensive package for Private client lawyers and their clients.

- **Valuation of assets** — Whether or not there is a discrepancy between the parties' understanding of the financial issues at stake, individuals can find themselves in dispute with other family members or business partners and needing to consider the value of their interests in privately-owned companies, income earned from the businesses, the liquidity of those businesses and the tax consequences of realising or transferring their interests. Working closely with family lawyers, contentious trust lawyers, and/or probate lawyers where such issues arise, we provide expert accountancy reports on behalf of claimants, defendants, or as a single joint expert.
- **Expert witness** — We provide expert reports on behalf of one party or act as a Single Joint Expert in relation to any or all of these issues. We are also on hand to act as a shadow expert, giving assistance with understanding figures and valuations prepared by others, drafting requests for additional explanations and answering any questions that might arise.
- **Tax advice** — The requirement to split assets between the parties can result in the need to consider multiple taxes. Both general and specific reliefs may assist in mitigating the tax that would otherwise be due and we can assist in identifying what reliefs may be available.
- **Pension-sharing** — We provide pension sharing reports for matrimonial disputes purposes. Although these reports are often referred to as actuarial reports, it is important to have the relevant pension knowledge and experience to be able to advise on the most suitable approach to sharing the parties' pensions and the resultant implications including the potential impact of the lifetime allowance on higher value pension sharing cases.
- **Investment management** — Your client may have a capital sum which they need to invest in order to provide a regular income or grow for the longer term. Capital needs careful ongoing management and Evelyn Partners has the experience to help. Our core service is discretionary investment management of bespoke diversified portfolios, individually tailored and expertly managed giving the client peace of mind. Remember, with investing your capital may be at risk.

Our approach

To get the best results, we believe in working with you to focus on what matters. We provide straightforward, jargon-free reports and advice that enable you to guide your client towards the best possible outcome. We understand your pressures and deadlines, whether set by the Court or your client's circumstances, meaning that you can come to us no matter what the query.

We are proportionate and flexible in the way that we work with you, providing a financial services solution to fit your client's needs and circumstances. We are committed to developing and promoting best practice standards and are in tune with the way that you work.

At Evelyn Partners, we understand that individuals who may never previously had to think about the detail of agreeing an investment strategy, planning future cashflows or matching future financial liabilities to withdrawals, suddenly have to do so - and all at a time when their minds are likely to be occupied by other matters. And so we go out of our way to ensure that we avoid the jargon and keep it simple.

For more information, please contact:

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Important information

Please remember the value of investments and the income from them can go down as well as up and you may not receive back the original amount invested.

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