Smith & Williamson

Financial assets in divorce

Matrimonial 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 investment management, pensions, tax, and forensic valuation to provide a fully comprehensive package for matrimonial lawyers and their clients.

- 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 Smith & Williamson 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.
- Pension-sharing – We provide actuarial reports on pensions in divorce. Although the reports are called 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.
- Tax advice – The need to split assets between the parties can lead to multiple taxes needing to be considered. 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.
- Valuation of assets – Whether or not there is a discrepancy between the parties' understanding of the financial issues at stake, your client will need to think about the value of their interests in privately-owned companies, the liquidity of the businesses to facilitate any settlement between the spouses and the taxation consequences of the various liquidity options available.
- Expert witness – We provide expert reports on behalf of husbands or wives 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.

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. As affiliate members of Resolution, we are committed to developing and promoting best practice standards and are in tune with the way that you work.

At S&W, 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.

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