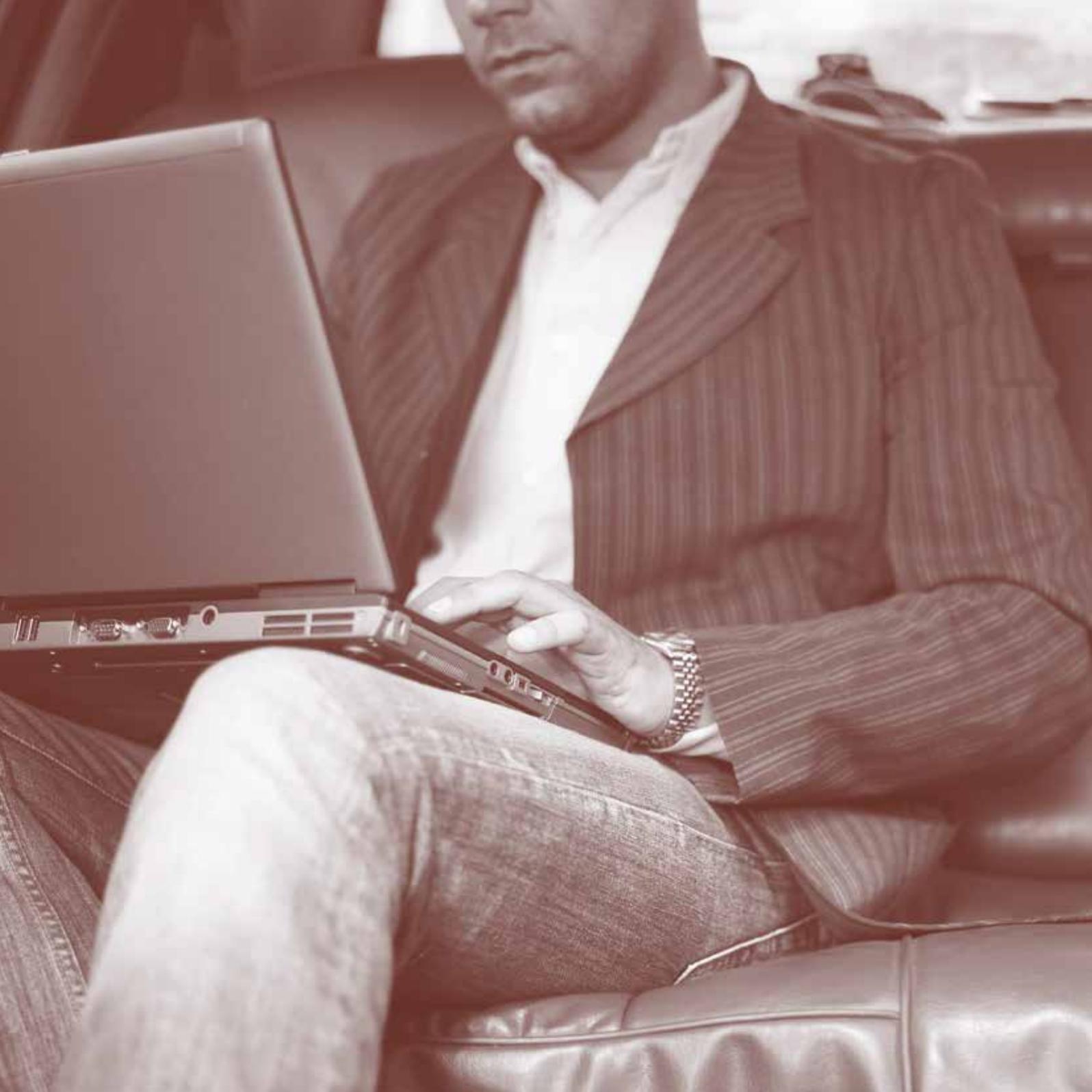




# About us

2021

Please read the important information



For over a century, we have managed the financial affairs of private clients and their business interests.

As of September 2020, Smith & Williamson is now part of the Tilney Smith & Williamson Group. We have been looking after the financial affairs of individuals, families and businesses for more than a century.

We offer a wide range of end-to-end services to meet your needs throughout your life and at every stage of the business lifecycle. We are a leading provider of accountancy, tax and financial advisory services, with more than 1,800 people across 11 offices in the UK\*, Ireland and Jersey.

Clients, whether individuals or companies, value our ability to provide tailored financial and professional services to enable them to achieve their ambitions.

\* December 2020

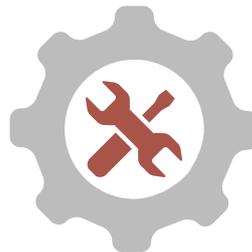
## Our approach

We believe in building close, long-term relationships with our clients, many of whom have been with us for generations. We deliver a first-class service by getting to know our clients and understanding their objectives and aspirations, as well as the longer-term challenges they may face.



## Our services

We offer an exceptionally broad range of services to individuals and businesses. This diversity means that clients can have all aspects of their financial affairs managed expertly under one roof.



## Working worldwide

Whether you're a private client, family office, trustee or business operating in multiple jurisdictions, our broad knowledge helps us understand the challenges and pressures you face in protecting and growing your wealth. Smith & Williamson LLP is a member of Nexia International, a leading, global network of independent accounting and consulting firms, providing a comprehensive portfolio of audit, accountancy, tax and advisory services internationally.







# Private client services

## Investment management

Our core service is the active management of bespoke discretionary portfolios. We have over 170 qualified investment professionals looking after the needs of domestic and global private clients, families, trustees, charities and smaller institutions.

## Tax and trusts

As well as offering a full compliance service, we provide specialist advice on succession planning, family business transactions, international taxes and the long-term planning of family finances. Clients include entrepreneurs, business owners and senior executives, as well as landowners and their families.

## Pensions and personal financial planning

Our expertise includes bespoke financial planning, personal financial management and counselling, personal pension provision, inheritance tax advice, tax-efficient investments, insurance and protection issues, and cash-flow modelling.

## International

Our specialists based in London and Jersey provide international solutions for tax, investment management, assurance, settlements and custody to a range of private clients and trustees.

## Trustee and executorship service

We act as trustees for a wide range of family, charitable and corporate trusts, and as executors of deceased persons' estates through Smith & Williamson Trust Corporation Limited, which is a member of the Association of Corporate Trustees. Appointments range from small trusts with a single asset to portfolios for landed estates and family offices.

## Tax investigations

Our specialist team helps individuals and businesses faced with in-depth tax enquiries. Our capabilities include the contractual disclosure facility, offshore compliance, personal and corporate tax investigations and any dispute with HMRC over back taxes, or the production of information and documents.

## Strategic advice

Our heritage in working with families across their personal and business affairs enables us to offer clients a rounded perspective as they address long-term considerations. This includes advice on family governance, setting up family offices and preparing the next generation.

# Business services

## Assurance and accounting

We provide assurance and business services to entrepreneurial businesses, professional practices, and non-profit organisations. In addition, we offer financial due diligence services, valuations, financial modelling and outsourced finance functions.

## Business tax

We provide a full range of direct and indirect tax advisory and compliance services. Our specialisms include VAT, transactions and reorganisations, remuneration planning and obtaining tax relief in areas such as enterprise investment schemes, VCTs, patent box and research and development tax credits.

## Transactions

We support our clients throughout their business lifecycle by providing support on M&A, strategic advice, valuations, financial modelling, financial due diligence and other transaction services. As an independent corporate adviser we deliver impartial, uncompromised solutions, structures and processes, drawing on the cumulative experience, expertise and sector focus of our team.

## Pensions and employee benefits

Our comprehensive consultancy service covers all aspects of company pension provision and associated risk benefits, from large company pension schemes to smaller tailored arrangements for directors and entrepreneurs. Other services include designing and implementing employee incentive schemes.

## Corporate trustee services

Providing corporate trustee services to a number of trust arrangements, we deal with pension schemes, employee benefit trusts and share plans. We also offer ancillary services such as accounting, administration, treasury, investment and payroll.

## Forensic accounting and litigation support

We provide the full range of litigation support services including quantum, valuations, forensic technology and fraud investigations. We have given expert evidence before the High Court and at International Arbitrations on behalf of claimants, respondents and as single joint experts. Our approach is to guide you through the numbers, explaining their impact in a commercial context.

## Fund administration

As an independent Authorised Corporate Director, we provide the specialist expertise and resources required to set up and administer funds (OEICs and AUTs) on a day-to-day basis. With over 30 years' experience, and by growing funds under management, we offer an efficient and professional service tailored to the needs of our clients.

## Restructuring and recovery

Our team provides turnaround, recovery and insolvency services to clients including banks, asset-based lenders, private equity firms, other financial institutions, SMEs and individuals. Other services include pre-lending reviews, independent business and solvency reviews, fraud investigations, advice on directors' responsibilities and asset tracing. In conjunction with our business tax team, we also provide an integrated service to wind-up obsolete but solvent corporate entities.

## Working worldwide

We act for UK businesses that trade internationally, offering advice on structuring, transfer pricing and overseas tax management. Our wider range of international services include transaction support, corporate finance, M&A, tax, accounting advice and support in addition to our private client services.



# Group offices

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## Important information

Investment does involve risk. The value of investments and the income from them can go down as well as up. The investor may not receive back in total the original amount invested.

By necessity, this briefing can only provide a short overview and it is essential to seek professional advice before applying the contents of this article. This briefing does not constitute advice nor a recommendation relating to the acquisition or disposal of investments. No responsibility can be taken for any loss arising from action taken or refrained from on the basis of this publication.

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Appropriate advice should always be taken before entering into transactions.

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