

Helena Luckhurst Partner

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Overview

Helena Luckhurst is a partner in the private capital department at Fladgate.

She specialises in structuring and managing family wealth using trusts, companies, powers of attorney and wills, and all aspects of transferring wealth to the next generation, including providing tax advice. She also advises on the administration of trusts and estates and has a particular interest in inheritance tax planning for both UK domiciled and non-UK domiciled clients. Helena advises individuals, families, entrepreneurs, trustees, personal representatives and attorneys and there is often an international element to her work.

An example of Helena's work includes managing the full range of succession and estate planning issues for a family business owner, including the use of family investment companies, inheritance tax efficient wills with cross-border aspects, working with foreign advisers, using the remittance basis of taxation and powers of attorney.

Helena is a member of both the Society of Trust and Estate Practitioners (STEP) and Solicitors for the Elderly. She writes a unique blog – Wealth Lawyer UK – providing legal insights for wealth managers, with whom she often works closely. Helena's expertise is highlighted in the Legal 500 and Citywealth.

Experience

- Co-ordinating the UK probate and tax strategy for a US\$60m US/UK estate.
- Considering the application of the UK's Statutory Residence Test and remittance basis issues for a returning UK worker.
- Advising Middle Eastern property entrepreneurs on the UK's Annual Tax on

Expertise

Private Wealth

- Estate & Trust Administration
- International Private Wealth
- Tax Planning & Trusts
- Contentious Trusts
- Luxury Assets
- Art

Industry

Private Client

International

Offshore

Location

Fladgate LLP
16 Great Queen Street
London
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Enveloped Dwellings (ATED), the UK tax implications of “de-enveloping” UK residential property from existing offshore structures and the most appropriate structure for new residential property acquisitions.

- Co-ordinating cross-border estate planning and wills for a Japanese family.
- Advising British couples and individuals on reducing their liability to UK inheritance tax, particularly in respect of their UK property portfolios.
- Providing separate legal advice to a widow on various aspects of the administration of her late husband’s estate, including her dispute with her co-executors and the potential to claim for further provision from the trusts in her late husband’s will.
- Advising executors and trustees of an estate comprising a farm business. Advice given on inheritance tax agricultural property relief, trust distributions and the proper exercise of trustees’ duties.
- Advising on the creation of a Family Investment Company to hold intergenerational family wealth.

Testimonials

“Fladgate LLP’s six-partner team is ‘very approachable, and gets to the point quickly’. Helena Luckhurst is ‘ultra-efficient’.”

Legal 500

“Helena Luckhurst advises British and overseas families and entrepreneurs who want to protect their wealth and successfully pass it down to the next generation.”

Legal 500

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