

## **INDIVIDUALS**

Looking for advice on complex personal tax matters? Well, look no further! We have a wide range of experience and expertise in advising individuals and their families.

Are you concerned about a significant inheritance tax bill?

Have you heard of the term Family Investment Company and interested to see how this fits in with your wider circumstances?

Are you leaving or coming back to the UK and require professional advice on how you will be taxed and pitfalls to be avoided?

If you answered YES to any of the above, then you are surely in the right place!

### **The type of work we usually get involved in:**

- High level inheritance tax planning
- Family Investment Companies
- UK and non-UK trusts
- Residency and domicile issues
- Complex personal tax compliance including remittance basis
- Capital gains tax planning
- Succession, wealth and generational transition planning
- Tax efficient investing and utilising the EIS / Seed EIS
- Non-domiciled tax planning including excluded property trusts and pre-arrival planning
- Tax on divorce and separation
- Cryptocurrency
- Defence against HMRC enquiries and investigations

## **BUSINESS OWNERS**

Our Chartered Tax Advisors work hand in hand with business owners, understanding the many stages of the life cycle. Although tax can be overlooked at times or valuable opportunities missed, we ensure that this key aspect is well-serviced throughout our relationship.

**Our key offerings include:**

- Advice on business structure and remuneration tax planning
  - HMRC Clearance Applications
- Group reorganisations such as the insertion of a holding company
- Trade and property demergers
  - Linked Investment Company for extracting funds for other investment ventures alongside a trading company
  - Legitimate, robust R&D claims, capital allowances and accessing other valuable reliefs
  - Incentivising employees through the design and implementation of EMI share schemes
  - Unapproved schemes and growth share implementation
  - Tax support on buying and selling a business
  - EIS and SEIS qualification
  - SSAS pension funds
  - Employee Ownership Trusts and MBOs
  - Succession and inheritance tax planning at a later stage
  - Defence against tax enquiries and investigations
- Succession and family planning as a later stage solution, including advice around inheritance tax

**PROPERTY LANDLORDS AND INVESTORS**

Structure and tax are two key areas that property developers, investors and landlords must regularly monitor and proactively assess.

**Below are a few areas we assist with:**

- Advice and implementation on property restructuring
- Property portfolio incorporations
- Linked Investment Companies
- Stamp Duty Land Tax
- VAT on property
- Land Remediation Relief
- Capital Allowances
- Commercial property and leases
- Non-resident landlords
- Annual Tax on Enveloped Dwellings (ATED)

**INTERNATIONAL TAX MATTERS**

In the fast paced world we live in, international mobility has become the norm. It is now important more than ever to ensure professional tax advice is undertaken to ensure compliance and reporting matters are correctly dealt with, whilst taking advantage of healthy tax breaks and avoiding potential pitfalls too!

**We are well-versed in international tax matters and are regularly instructed on the below:**

- Setting up overseas and international expansion
- Corporate residency
- Dubai and GCC company set up
- UAE tax advisory and compliance
- Saudi Arabia company incorporation
- Transfer Pricing
- Offshore trusts
- Coming to and leaving the UK
- Withholding taxes and profit extraction
- Non-resident landlords
- Register of Overseas Entities

#### **PROFESSIONAL INTERMEDIARIES**

**We work closely with the followings professionals:**

- Accountants
- Lawyers/solicitors
- Trustees
- Fiduciaries
- Wealth managers
- IFAs
- Financial planners

Our tax support, either directly with your client or 'in the background' as your in-house tax consultant, we can service your clients tax needs and help achieve their goals.

Please contact me directly and happy to arrange an informal chat: [omar@aswatax.co.uk](mailto:omar@aswatax.co.uk)