TBP THE BURNSIDE PARTNERSHIP

The Burnside Partnership

Specialist Private Client **Lawyers & Tax Experts**



CLIENT GUIDE

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WELCOME TO

The Burnside Partnership

This guide explains who we are, what we do and how, when you become our client, we put your care at the centre of our approach.

We are here to make your life easier, whatever the opportunity or obstacle you are facing. If you want to structure your tax matters more efficiently, provide for a secure future or attain peace of mind with an updated will, we can help. We can support you to administer a loved one's estate following a bereavement or guide you through a dispute within your family.

Our award-winning team handles a huge variety of legal and tax services, and many of our lawyers and tax advisors are recognised experts in their field. We offer more than just technical expertise, however. Our clients have come to expect canny thinking, deployed to achieve the best results possible. To achieve those results, we sometimes collaborate with professionals working in areas outside of our expertise – financial advisors, surveyors, property agents or lawyers practising in other areas of the law. As our client, you can be sure we will never recommend another professional we have not worked with before and would not use ourselves.

We enjoy getting to know our clients, often forming relationships that span generations. We are a new breed of private client consultancy: our vision is to support you with life, not just law, and as such we are constantly expanding what we offer. Read on to discover the breadth of our services, and the commitment we make when we work with you, in our Client Service Pledge.

Why instruct our firm?

The three reasons why our clients choose to instruct The Burnside Partnership...

01 We're experts

We're a specialist firm and have in-depth knowledge. We believe there's no substitute for experience. We work to the highest standards and many of our advisors are recognised experts in their field – see Page 3 for details.

02 We offer the highest standard of client service

We're here to make our clients' lives easier and excellence in our client service drives our whole approach. To this end, everyone at our firm is committed to adhering to our Client Service Pledge - see Page 7.

03 We provide multi-disciplinary advice

Our firm brings together lawyers and tax professionals under one roof, allowing a unique breadth and depth to our expertise. What's more, we work with other experts too.

Our story

Founded in 2015.

We were established to provide technically excellent advice delivered with sensitivity, in a clear straightforward manner. Though the scope of our work continues to grow, the philosophy that guides our approach remains the same, and clients continue to value what we do.

Who we are

We focus on advising private clients on their legal and tax affairs. We're a team of specialists – which means we know what we're talking about.

We believe key to our approach is combining professionalism with empathy – we can better help our clients if we can try and step into their shoes.

To ensure everyone is always at the top of their game, we take continuous professional development and training seriously. We've won numerous awards for our training programmes.

We've plenty of awards and accreditations to our name, as do many of our specialists. These include The Legal 500 Leading Firm 2025, Chambers High Net Worth 2024, The Legal 500 Next Generation Lawyers, Leading Private Client Lawyer, eprivateclient Excellence Awards 2024, Chambers High Net Worth Solicitor Firm of the Year 2020, eprivateclient Top Law Firms, Apprenticeship Employer of the Year Award.

For details on our experts visit:
www.theburnsidepartnership/people

Anna Burnside
Senior Partner

Della Burnside
Managing Partner

What we do

We pride ourselves on our high standard of client care in these areas:

Wills & Probate

Your contacts for this service:

Joanna Ensor
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07496 216361

Lanka Bandara
lanka.bandara@theburnsidepartnership.com
020 3883 1288

Sabrina Underwood
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07494 577322

Wills & LPAs

We advise on the many factors relevant to writing a Will, including inheritance tax (IHT) planning. We also consider a client's own individual circumstances in depth to advise on whether to put in place a Lasting Power of Attorney.

Acting as an attorney

We act as attorneys (financial and health & welfare) for many clients. We also provide attorneys with advice to ensure they fulfil their duties and responsibilities.

Probate

Probate can be a daunting task, particularly when coupled with the distress of losing a loved one. We handle matters professionally and efficiently – at the same time ensuring tax planning opportunities are maximised.

Court of Protection & Deputyship

Your contacts for this service:

Joanna Ensor
joanna.ensor@theburnsidepartnership.com
07496 216361

Applying for deputyship

We guide clients through the process of applying for deputyship. We also advise on other Court of Protection applications, including obtaining permission for attorneys to make gifts, dealing with property sales and making statutory Will applications.

Vulnerable adults & children

Our experts are experienced in assisting vulnerable adults and we support parents and carers in making plans to support children with Autistic Spectrum Disorder, special educational needs or those who are disabled.

Contentious Wills & Estates

Your contact for this service:

Neil Johnson
neil.johnson@theburnsidepartnership.com
020 3883 1288

We're able to advise both individuals and charities on any contentious matter, including Will challenges; claims against estates under the Inheritance Act; and trust disputes between trustees, or trustees and beneficiaries.

Disputes after the death of a relative can be distressing, acrimonious and complex. We take a sensitive and proactive approach, favouring a swift approach to review a claim and advise on next steps to protect the client's position. We work hard to achieve the best possible outcome in the most cost-effective way.

Charities

Your contact for this service:

James Taylor
james.taylor@theburnsidepartnership.com
07903 627562

We assist clients in achieving their philanthropic goals - whether leaving a legacy in their Will or setting up and running a charity.

Our charity services include advising on the best type of charitable vehicle to use; preparing governance documents, accounts and management information; completing tax returns; dealing with the recovery of tax due to charities; and liaising with the Charity Commission.

Cross-Border Planning

Your contacts for this service:

Anna Burnside
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We advise on cross-border succession, capacity and tax issues. By way of example, we can advise those with assets in the UK and abroad on how to structure their Wills, so they are valid in all relevant jurisdictions, carry out their wishes in the relevant jurisdictions and deliver tax efficient advice.

Our advisors have extensive experience in providing advice on cross-border issues that arise when someone owns assets outside the UK, or has some other connection with a foreign jurisdiction – for example, when their partner comes from another country, or when their children live or work abroad.

Working with trusted advisors in other jurisdictions if necessary, or the clients' network of advisors, we pride ourselves on being able to deliver a seamless and co-ordinated service to our clients, regardless of where in the world they (or their family or assets) are located.

Tax & Trusts

Your contacts for this service:

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Lanka Bandara

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Tax planning

Our experts advise on all aspects of inheritance tax (IHT), capital gains tax (CGT) and income tax, for both UK and overseas individuals. We also deal with succession, exit and retirement planning, together with the consequences of divorce and separation.

IHT planning & the family business

The current tax rules offer several highly favourable tax saving options for owners of a family business. There is no guarantee that these rules will stay in place indefinitely and now is a good time to take stock of the options available. Whilst the potential for saving tax is highly important, it is important to do what is right for you. Our experts are here to advise you.

Trusts

Trusts can be very valuable vehicles for safeguarding family and business assets. However, they are complex legal arrangements. We guide clients through the complications.

Trusts administration & compliance

We assist trustees with the tax affairs, management and administration of trusts. Trusts can be liable to a range of tax compliance issues and we can ensure these are all dealt with.

Tax health checks

We can review clients' income and capital requirements and help them plan ahead, whether for retirement, selling a business or for succession purposes.

Personal tax compliance

We can prepare self-assessment tax returns, as well as tax repayment claims. We also advise on clients' reporting obligations and provide guidance on correspondence or enquiries with HMRC. We advise clients on the tax consequences of various types of investments, including SEIS, EIS, pensions and shares and maximise the utilisation of tax reliefs and losses.

THE BURNSIDE PARTNERSHIP

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We're constantly looking for ways to improve the service we offer clients.

If you have any feedback or ideas, please contact Della Burnside, Managing Partner at **della.burnside@theburnsidepartnership.com** or 07889 615593. We'd love to hear from you.

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