



richardson swift

Inheritance Tax Services

Trust Services

Trusts are a part of the overall inheritance tax planning web and can be used to aid wealth preservation, allowing assets to be passed down through generations in a secure and tax efficient manner.

Although successive Governments have legislated to make it less attractive to setup trusts it is possible with correct structuring to achieve tax efficiency.

Our trust services cover the following:

- advice in considering the benefits of establishing the trust
- setting up the trust and reporting to H M Revenue and Customs
- assist with the administration of the trust and in preparing accounts and trust tax returns
- assist with preparing inheritance tax returns
- regularly conduct reviews to make sure it is managed tax efficiently and advising of any planning opportunities

We offer a bespoke, cost-effective, professional trust service that covers all aspects of trust tax administration for our clients. Our flexible service means you can choose for us to assist with as much of as little as you need.

Our costs for preparing trust tax returns start at £350 with preparation of trust accounts typically ranging from £750 to £2,000 depending on complexity. Costs of preparing Inheritance tax returns do vary based on types of assets involved.

Advisory services will typically range between £750 and £2,000 depending on nature and type of advice involved. These costs are only an indicator and precise quotes will vary based on specific circumstances which can be agreed at the time.



To find out more about our personal tax services, IHT & probate, contact director Calvin Healy for a free initial discussion. Email Calvin on ch@richardsonswift.co.uk or call 01225 325580.

About Us

We are the largest independently-owned accountancy practice based solely in Bath. We specialise in advising owner managed businesses, private individuals and their families. And pride ourselves on providing great service and innovative solutions.

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