Saffery

# Supporting wealth across generations

Since 1855



We have extensive experience in advising some of the UK's wealthiest individuals, families and business owners. We help them protect, maintain and enhance their wealth in the most commercial, tax efficient and cost-effective manner possible.




Why Saffery
Private Wealth →
Business owners →
Passing on wealth →
Wealth structuring →
Property →
Residence and domicile →
Tax compliance →
Committed to great client service →
Saffery in numbers →
Get in touch →

# Why Saffery Private Wealth

**Private wealth is about more than managing tax. It's about helping individuals, families, family offices and business owners make confident decisions, protect what they have built and plan for the future. We provide clear, pragmatic advice designed around your ambitions, your family and your wider interests.**

## A joined-up approach

Our specialists work across private client tax, business advisory, succession planning, property and international matters, delivering co-ordinated advice that considers your wider circumstances.

Many of our client relationships span decades and generations, providing continuity and trusted advice as priorities evolve over time.

## Recognised specialists

Our Private Wealth team is consistently recognised for advising wealthy individuals and families, including being named Accountancy Team of the Year (large firm) at the STEP Private Client Awards 2026. The team has also been recognised at the eprivateclient Excellence Awards 2024 and the WealthBriefing European Awards 2025 and 2026 across multiple categories, including Accountancy Team, Tax Team and Estate Planning.



# Business owners

**For many business owners, their business is one of their most valuable assets. Decisions made throughout the lifecycle of a business can have significant implications not only for commercial success, but also for personal wealth, family interests and long-term succession plans.**

**We work with entrepreneurs, owner-managed businesses and multi-generational family enterprises, providing integrated advice that aligns business objectives with personal and family ambitions. By bringing together specialists from across tax, accounting and advisory disciplines, we help owners make informed decisions at every stage of their journey.**

### Start-up and growth

From launching a new venture to scaling an established business, we help owners build strong foundations for long-term success. Our advice is designed to support growth while ensuring ownership structures remain aligned with wider personal and family goals.

Our support includes:

- Business and ownership structuring
- Remuneration and profit extraction strategies
- Accounting and compliance services
- International expansion and diversification planning
- Family investment companies (FICs), trusts and other ownership structures

### Preparing for transition

As businesses mature, owners often begin considering succession, wealth preservation and future ownership. Whether planning for a family transition, management buyout or eventual sale, early preparation can help maximise value and achieve better outcomes.

Our support includes:

- Succession planning for family businesses
- Governance and ownership reviews
- Wealth structuring and asset protection strategies
- Trust and FIC planning
- Tax-efficient restructuring ahead of a transaction

### Exit and post-sale wealth planning

A successful exit can create new opportunities, but also new complexities. We help business owners prepare and navigate transactions while ensuring the proceeds of a sale are structured and managed effectively for the future.

Our support includes:

- Tax-efficient business exits
- Trade sales and management buyouts
- Transaction and exit planning
- Post-sale wealth structuring
- Family wealth, inheritance tax and succession planning



> *Decisions made throughout the lifecycle of a business can have significant implications not only for commercial success, but also for personal wealth.*

# Passing on wealth

**Effective succession wealth planning is about creating a clear strategy that enables wealth to support your ambitions, your family and future generations. We work closely with wealthy individuals and families to develop tailored plans that reflect their circumstances and long-term objectives.**

Whether the priority is preserving family wealth, supporting future opportunities, funding retirement or preparing the next generation for responsibility, we provide practical advice that evolves as priorities change over time.

Succession planning is often one of the most important decisions a family will make. Our specialists help clients navigate the practical, commercial and tax considerations involved in transferring wealth, ensuring plans are structured efficiently and aligned with family goals.

For some families, wealth planning also includes charitable giving and philanthropy.

We help clients structure giving in a way that reflects their values and long-term goals.

Our support includes:

- Wealth transfer and inheritance tax planning
- Succession planning for family wealth and business interests
- Family governance and decision-making frameworks
- Multi-generational planning for family businesses and landed estates
- Streamlining complex financial affairs
- Philanthropy and charitable giving strategies



# Wealth structuring

**Building and preserving significant wealth often requires the right ownership structures, governance arrangements and long-term planning.**

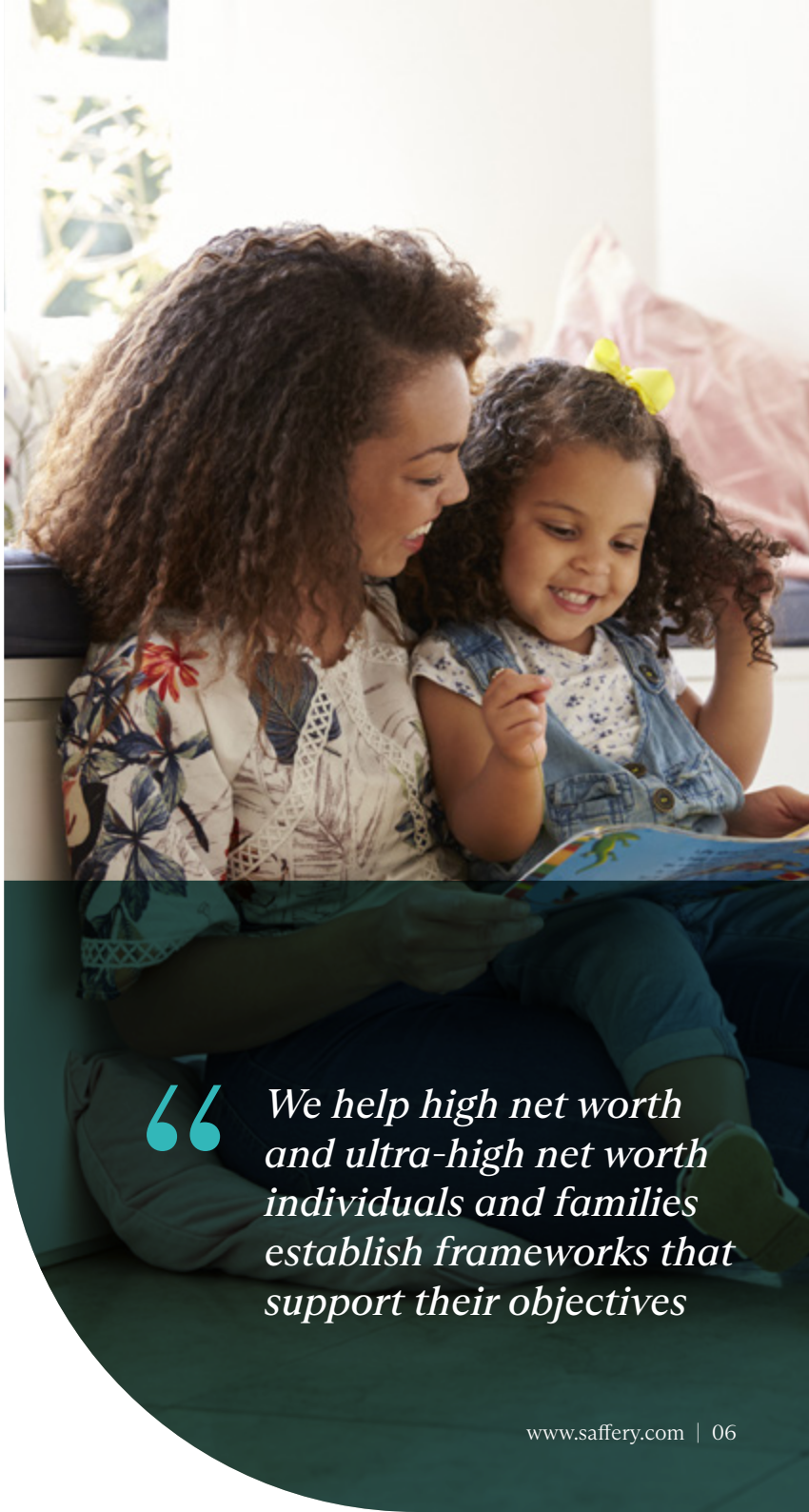
We help high net worth and ultra-high net worth individuals and families establish frameworks that support their objectives today and for future generations, including through the use of trusts, family investment companies (FICs), and other bespoke planning structures.

Irrespective of how wealth is held, we take a joined-up approach that considers family, business and tax implications together.

We also work alongside family offices and key stakeholders to help oversee complex wealth arrangements, supporting governance, succession planning and long-term stewardship.

Our support includes:

- Trust and FIC structuring
- FIC planning and implementation
- Wealth preservation and asset protection
- Succession and intergenerational planning
- Governance structures for multi-generational wealth
- Reviews of existing wealth structures
- Trustee and family office support
- Cross-border wealth planning



*“We help high net worth and ultra-high net worth individuals and families establish frameworks that support their objectives*

# Property

**Property can play a significant role in preserving and growing wealth, but ownership structures, tax obligations and regulatory requirements can be complex. We work with a range of clients across all aspects of residential and commercial property ownership.**

Whether you're acquiring, holding or disposing of property, we help you make informed decisions, manage compliance obligations and structure ownership in a tax-efficient way.

Our expertise includes:

- Ownership structuring for individuals, companies and trusts
- Residential and commercial property tax advice
- Capital gains tax (CGT) planning and reporting
- Property portfolio planning including incorporation of property partnerships
- Accounts and tax returns for property businesses
- Advice for non-UK residents owning and investing in UK property
- Compliance and reporting support



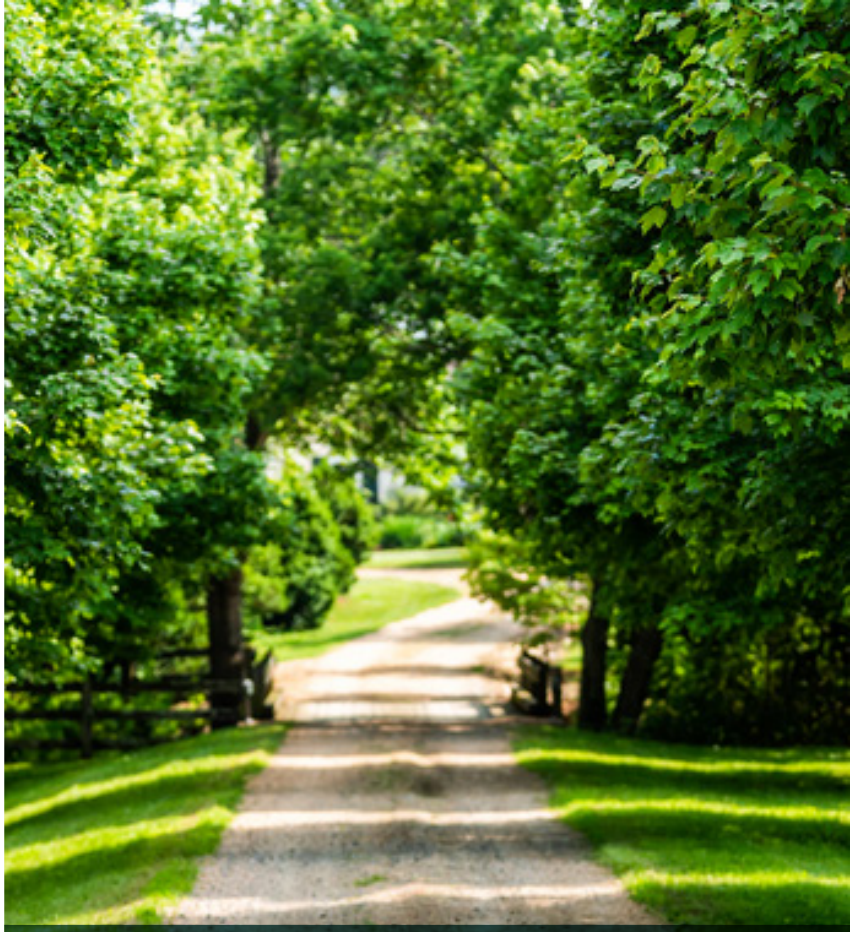
# Residence and domicile

**As families become increasingly international, managing wealth across multiple jurisdictions requires careful planning and specialist advice. We help individuals, families and business owners navigate the tax and succession implications of international wealth.**

Whether you're moving to or from the UK, investing internationally or managing cross-border structures, we provide advice designed to protect your interests and support your long-term objectives, including helping clients understand and navigate the Foreign Income and Gains (FIG) regime and other evolving international tax rules.

Our support includes:

- UK residence and domicile advice
- Advice on the FIG regime
- Cross-border wealth and succession planning
- Double taxation treaty analysis and planning
- International trust and estate structuring
- Inheritance tax planning for globally connected families
- International tax compliance and reporting
- Advice for internationally mobile familiesTrustee and family office support
- Cross-border wealth planning



> *We help individuals, families and business owners navigate the tax and succession implications of international wealth.*

# Tax compliance

**Managing personal tax affairs has become increasingly complex. Effective compliance requires more than the completion of tax returns. It requires accurate reporting, proactive advice and ongoing oversight.**

Our private client tax specialists support individuals, trusts, partnerships and estates, helping them meet their obligations while identifying opportunities to manage tax efficiently and reduce risk, both with UK tax compliance and for internationally mobile clients affected by changing international tax rules.

We also work closely with clients when significant transactions arise, helping them understand the wider tax implications before decisions are made.

Our support includes:

- Personal tax compliance for individuals, trusts, partnerships and estates
- Inheritance tax and capital gains tax reporting
- Tax compliance for internationally mobile individuals and families
- Trust Registration Service, CRS and FATCA reporting
- HMRC enquiries, investigations and disclosure matters
- Disclosures and regularisation of historic compliance.



# Committed to great client service

We carry out ongoing client feedback research. The most recent phase of this (2026) saw on overwhelmingly positive response from clients, with a mean overall satisfaction score of 8.7 out of 10.

Clients identified our strengths as relating to the quality of advice provided and the relationships built, but also with understanding their business and needs.

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Our clients gave us an overall satisfaction score of:

**8.7 out of 10**

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**Clients score us highly in the following areas:**

For quality of advice, demonstrating the highest level of technical competence

**8.9 out of 10**

For our understanding of their business needs

**8.8 out of 10**

For the relationship with the Saffery team

**8.8 out of 10**

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Our client listening programme highlights the extent to which our clients value the relationship they have with the Saffery team looking after their affairs.



*"We find their advice first rate, provided by friendly approachable staff."*

*"I have worked with Saffery for a number of years and have been consistently happy with the service we receive. The audit process is thorough and rigorous but feels very human; the teams discuss things with us and work with us. There is a reasonableness and collaborative feel which can often feel missing with other firms."*

*"Saffery are an outstanding firm of accountants. They have supported us from an early stage of our growth and been valuable advisors. The quality of their work has provided us with much comfort, and we would not hesitate in recommending them to anyone considering a firm of trusted advisors."*

*"We have worked with Saffery for nearly 20 years. In this time we have never been disappointed with the quality and speed of advice received or the quality of people we have worked with."*

# Saffery in numbers

**Our experts work with clients to support opportunity and enable success. We're here to help clients achieve their long-term ambitions by optimising opportunities and turning advice into action.**

From interpreting tax complexities and identifying key financial structures to building tailored strategies for your goals, our team is here for you.



**90+** partners



**1,300+** people



**£163m** fee income (2025)



**15th** largest UK accountancy firm by turnover



Established in **1855**

## Nexia

As a proud member of Nexia, a worldwide network of trusted member firms, we've got access to local insight on a global scale. Our close alignment with Nexia enhances our capabilities for our clients across the globe.



Combined fee income of
$2.73bn



118
countries



187
member firms

# Thank you

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# Get in touch

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