

Our Tax Team

– unashamedly focused on tax



Julian Smith | Private Client Services Partner

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Julian specialises in inheritance tax, capital gains tax planning, the tax efficient use of trusts and providing UK tax advice to individuals not resident or not domiciled in the UK.

Julian spent 19 years with PwC. He qualified as a Chartered Tax Adviser in 1988, is the chairman of the Bournemouth branch of the Society of Trust and Estate Practitioners (STEP). Julian joined Princecroft Willis in 2003 to head up the Private Client Services Department.



John Caithness | Business Tax Director

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John deals with a variety of tax and related matters. His particular specialism is in Employer Solutions which looks at the tax efficient extraction of profits, including flexible benefits and share scheme matters.

John started his career with 5 years at HMRC in London. He then spent 21 years with Grant Thornton as a Senior Manager, before joining Princecroft Willis in 2007.



Heather Williams | Corporate Tax Director

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Heather specialises in all aspects of tax planning for the Owner Managed Business, transaction taxes and taxation advice for companies expanding overseas.

Heather is a Chartered Accountant and a member of the Institute of Taxation. She headed OMB taxation at KPMG Southampton. After qualifying with a distinction in her MBA at Manchester Business School she spent 10 years at main board level running successful global businesses. She has returned to the profession and brings a unique combination of commercial experience with specialist tax planning which helps her identify key planning opportunities for clients.



Simon Anslow | Director of VAT Services

Direct dial: **01202 663611**
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Simon is responsible for dealing with all VAT and indirect tax issues, ranging from basic compliance and efficiency management, through to complex planning and dispute resolution.

After a 15-year career with HMRC including investigation activity and legal advocacy, Simon switched sides some 13 years ago, firstly as a partner in Haines Watts and more latterly as a Southern regional VAT Director with Tenon. He joined Princecroft Willis in 2009 to head up the VAT service.

You need to travel hundreds of miles to beat our tax team but just around the corner to meet them

great minds
think differently



INVESTOR IN PEOPLE



dorset business
the chamber of commerce & industry



Focus on Tax Issues

Exit and Succession Planning

You can save a great deal of money by careful tax planning when you sell your business. If you are thinking of:

- selling the whole or part of your business;
- retiring;
- a management buy-out;
- offshore planning;
- group reorganisation or reconstruction;
- de-mergers;
- purchase of own shares;
- cessation or liquidation;

tax should be a key part of your planning.

For further advice, call Julian Smith (01202 663613) or Heather Williams (01202 663612), who specialise in exit planning.

Estate Planning

It is never too early or too late to review your personal financial affairs to ensure that they are structured in the most tax-efficient manner. If you are concerned with:

- maximising wealth and wealth preservation;
- assessing the tax-effectiveness of a Will;
- potential Inheritance Tax and Capital Gains Tax liabilities;
- planning for business succession;
- the use of trusts;

we have specialists who can help.

For further advice, please contact Julian Smith (01202 663613) who will be happy to assist you.

Employee Issues

Good tax administration and planning are essential in the area of employees. If you have to deal with:

- remuneration planning;
- dividend strategies;
- benefits and expenses;
- employee share schemes;
- P11Ds;
- employee incentivisation;

then you need specialist tax advice. We are happy to help you if HMRC want to inspect you.

If you require further assistance, please contact John Cairness (01202 663620).

VAT Issues

VAT is often the forgotten tax and notoriously complex. If you are involved in property transactions, supplying services, intellectual property, dealing with overseas companies or letting surplus accommodation, you will need to consider VAT aspects of the matter.

For further advice, please contact Simon Anslow (01202 663611).

Minimising Business Tax

It is important that businesses fulfil their statutory obligations accurately and on a timely basis. In addition, tax planning opportunities are often identified during the compliance process. The choice of business entity, tax efficient structuring of overseas expansion and utilisation of losses can often save significant taxation.

If you would like information on this service please contact Heather Williams (01202 663612) or John Belinger (01202 663605).

Pension Advice

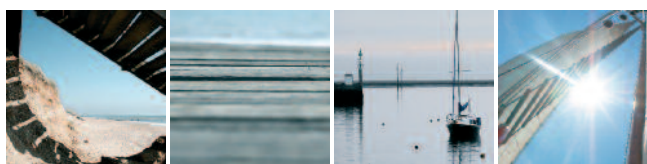
Pension planning is an important part of the business and the owner-manager's overall financial strategy. We work closely with a number of financial advisers to ensure that your pension arrangements are tax-efficient for you and the company.

For further advice, call Heather Williams (01202 663612).

Personal Tax

Keeping your personal tax affairs in order has never been so important. We will ensure that you minimise your tax liabilities while complying with your statutory responsibilities.

For further advice, please contact Julian Smith (01202 663613) who will be happy to assist you.



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