Private Wealth Planning

Katherine Hague
Partner (TEP),
Head of Private Wealth Sector
T: 01223 532 749
E: khague@hcrlaw.com

Katherine specialises in tax and succession planning for individuals, their families and Trustees often involving landed estates, private limited companies and international elements. Katherine has a keen interest in entrepreneurs, their businesses and structuring their affairs to meet their needs. Katherine's work involves the preparation of tax efficient and flexible Wills, Lasting Powers of Attorney, the creation and administration of trusts, structuring of Family Investment Companies and the administration of complex estates.

How we can help:

- Advise you on succession plans for your business, whether on creation of a new business or pre-exit planning
- Review your Inheritance Tax position, considering the available reliefs and options for tax mitigation
- Advise on business protection strategies in the event a shareholder is critically ill or dies for example, key man insurance and cross-options.

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