

when life is broken down into pieces...

...*trust us* to solve  
the problems



## Private Client Division

### Our solution

We are committed to our Private Clients and our team has extensive experience of looking after and preserving the assets of the family.

We advise on all aspects affecting the private individual and their personal and financial affairs. We make sure that you preserve your assets by minimising the amount of tax payable and that your family, friends and favourite charities inherit what you want them to have.

Our dedicated division which includes solicitors who are members of the Law Society Probate Section, acts for individuals, trustees and other professionals.

Our approach is to offer a service, which is personal, cost-effective and recognises the sensitive nature of many of the issues you face.

The team will be able to handle your legal concerns quickly and efficiently in a practical and considerate manner.

### Our services include

- Preparation of Wills
- Reviewing, updating and amending existing arrangements

- Tax planning and Inheritance Tax
- Probate and administration of estates
- Deeds of Variation
- Creation and administration of trusts
- Inheritance and disputed estate claims
- Preparation of enduring powers of attorney and Court of Protection work

### Client benefits

- A Will is a tax planning tool and our experts can give you information that may save you thousands of pounds in Inheritance Tax
- Our team can prepare your Will quickly and efficiently, we are even able to provide a same day service if urgency is a priority
- Outstanding client care
- A fresh approach to your individual needs

### Is this relevant to you?

Making your Will and reviewing it periodically is part of keeping your personal and business affairs in order. There are a number of good reasons for making a Will:

- It saves time, money and minimises distress for your next of kin to have clear instructions regarding your wishes

- You ensure that your estate will go to the people you wish to benefit, whereas the statutory provisions which take effect if no Will is left could have the opposite result to your intentions.
- A professionally drawn Will may reduce liability to Inheritance Tax. When the value of a house and the proceeds of life insurance policies are taken into account there maybe a substantial liability to Inheritance Tax leaving your beneficiaries with heavy financial burdens.

### What's the next step?

We can help you create your Will or amend your existing arrangements.

Call our Will specialists on:

**0113 244 9931**

for a free appointment. It may be the most valuable call you make this year.

For more information contact:

*Jonathan Baum* at the address below or email - [jbaum@levisolicitors.co.uk](mailto:jbaum@levisolicitors.co.uk)