



PRESERVE

PLAN

GROW

WEALTH

# BEXLEY BEAUMONT

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PRIVATE WEALTH

# Flexibility, certainty and support in a changing world.

Bexley Beaumont's Private Wealth Team provides complex and specialist advice in private wealth. The Team acts for individuals, families, entrepreneurs, landed estates, family businesses and family offices. They also act for clients with international assets and/or family across the world.

The Team regularly act on high value and complex succession, family matters, tax planning and trust restructuring work.

That is why clients rely on the Private Wealth offering by Bexley Beaumont.



## Who we are

Bexley Beaumont is an award-winning boutique law firm known for its ability to provide high quality, clear, pragmatic advice and innovative and pragmatic solutions.

The Private Wealth offering is delivered by specialist experienced partners.

The Private Wealth Team take a collaborative and holistic approach, they work as one team to best plan and protect their clients' assets from every angle, whether that is pre-emptive planning from the family and/or probate partners for family and business succession, to having to litigate in family or probate matters should disputes arise. The team benefits from each other's expertise to ensure that clients have a seamless, tailored, and rounded service with specialist advice at the right time.

## What we do

The Private Wealth Team has been designed to give clients an appropriate level and type of support for their individual needs and budget. The Team consists of talented family, probate, private client and professional negligence partners. They help individuals and their families manage, grow and

protect their private wealth providing a personal and tailored service. They work with you to achieve your individual needs and often work alongside your other professional advisers.

The Team helps clients to protect their assets and wishes for succession by way of pre-nuptial agreements, trusts, Wills and LPAs. However, if an attack is levied on those documents during life or on death, or an individual's assets are otherwise put at risk (for example, on divorce) the Private Wealth Team can also help from the contentious side.

Bexley Beaumont has a proud reputation for providing high quality advice in a cost-efficient manner.

Aware of the need to work to priorities and budgets, it is also flexible on fees with options to suit the requirements of individual clients.

However, one thing which Bexley Beaumont absolutely doesn't compromise on is service quality.

# YOUR PRIVATE WEALTH TEAM



**Eleri Jones**

Family Partner

[Click here to see Eleri's profile](#)



**Sahida Ahmed**

Family Partner

[Click here to see Sahida's profile](#)



**Lisa Jones**

Private Client Partner

[Click here to see Lisa's profile](#)



**Maria Longeran**

Private Client Partner

[Click here to see Maria's profile](#)



**Heather Roberts**

Contentious Probate Partner

[Click here to see Heather's profile](#)

To find out why so many businesses trust Bexley Beaumont to fulfil their Private Wealth needs, why not get in touch...

# BEXLEY BEAUMONT

0333 996 0640 • [BB@bexleybeaumont.com](mailto:BB@bexleybeaumont.com)

Centurion House, 129 Deansgate, Manchester M3 3WR

85 Gresham Street, London EC2V 7NQ

## **Winner at:**

**The Legal 500 Northern Powerhouse Awards 2023**

**The Modern Law Awards 2022**

**The North West Business Masters Awards 2021**

**The National Business Women's Awards 2021**

## **Shortlisted at:**

**The Lawyer Awards 2023 and 2022**

**The Law Society Excellence in Law Awards 2021**

**The British Legal Awards 2021**

**The Growing Business Awards 2022**