

Coordinating Wills, Trusts, and Business Assets Under One Estate Strategy



Client Overview

A high-net-worth family approached us with a complex challenge: their substantial wealth was spread across multiple structures—personal assets, business holdings, and various trusts—but there was no unified strategy tying everything together. With different advisers managing separate portions of their portfolio, the family lacked clarity on how their estate would transition across generations. They needed a comprehensive solution that would consolidate all elements under one cohesive estate plan, ensuring efficient wealth management and seamless coordination among all their professional advisers.





The Challenge

Multiple advisers operating in silos created duplication of effort and inconsistent tax strategies. The family faced missed opportunities for tax reliefs and lacked a clear, unified vision for intergenerational wealth transfer. Without coordination, their estate plan was fragmented and inefficient.



Our Approach

Lanop Business & Tax Advisors conducted a comprehensive review of all family assets, bringing together solicitors, tax specialists, and financial planners. We drafted a unified estate plan, optimised trust and company structures to minimise tax exposure, and established ongoing review protocols to maintain alignment across all advisers.



The Outcome

The family now benefits from a fully consolidated estate plan with improved collaboration between all professional advisers. We achieved a 20% reduction in annual professional fees through streamlined management, while providing long-term wealth preservation and clarity for future generations.

20%

Fee Reduction

Annual professional fees decreased through coordinated management and elimination of duplicated effort

100%

Asset Integration

Complete consolidation of wills, trusts, and business holdings under one unified strategy

3+

Generations Protected

Long-term wealth preservation framework established for multi-generational succession

Client Quote: "Lanop brought everything together. We finally have one coordinated plan for our future."

Comprehensive Estate Planning That Unifies Your Wealth Strategy

At Lanop Business & Tax Advisors, we understand that high-net-worth families need more than fragmented advice they need a single, coordinated strategy that brings together all aspects of estate planning, trust management, and business succession. Our integrated approach ensures that every element of your wealth works in harmony, with all advisers aligned on your goals and compliance requirements.

We specialise in eliminating inefficiencies, identifying tax-saving opportunities, and creating clarity for families navigating complex estate structures. Whether you're planning for succession, optimising existing trusts, or seeking to streamline professional advisory relationships, we provide the expertise and coordination you need for long-term success.



01

Comprehensive Asset Review

We gather and analyse all personal, business, and trust holdings to understand your complete wealth picture

02

Collaborative Planning

We coordinate with your solicitors, accountants, and financial advisers to draft a unified estate strategy

03

Structure Optimisation

We refine trust and company structures to minimise tax exposure and maximise wealth preservation

04

Ongoing Alignment

We establish regular review protocols to ensure all advisers remain coordinated on compliance and succession goals

Take the Next Step Toward Coordinated Estate Planning

Don't let fragmented advice and missed opportunities compromise your family's wealth preservation. Book your strategy call today and discover how integrated estate and business planning can provide clarity, reduce costs, and secure your legacy for generations to come.

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