

strabens hall...

Financial Planning | Wealth Structuring | Investment Advice

Family Law Services

How we can help

Pension sharing: Pensions are often one of the largest assets that we are asked to advise on in cases of a family split. We advise how pension assets should be shared between the respective spouses, while minimising their overall tax liabilities. Our Pension Sharing Reports are written from a background of broad practical experience. They set out not only the technical detail and reasons for the advised adjustments but also the implications of the proposed actions.

We have expertise in a wide range of pension types, including:

- UK money purchase and defined benefit pensions
- Small Self-Administered Schemes (SSASs)
- Unapproved and unfunded arrangements
- Recognised Overseas Pensions Schemes (ROPSs)
- Qualifying Non-UK Pension Schemes (QNUPSSs)
- International Pension Plans (IPPs)

What to expect?

- How the parties should allocate pension capital to ensure an optimum solution for both sides
- How to achieve equalisation of income on retirement according to actuarial assumptions
- Detailed consideration of the tax implication for each party
- How to minimise the impact of the Lifetime Allowance charge
- Clear, practical advice on how to implement a Pension Sharing Order
- Expert witness (single or joint) reporting in compliance with Part 25 of the Family Procedure Rules

Other areas we can help:

Negotiation: We can advise on the structure of a divorce settlement and provide input to negotiations.

Mediated Settlements: We have been involved in mediation with clients, providing critical input into the agreed settlement regarding important topics such as pensions, wealth structuring and the tax implications of splitting assets in different ways.

Income, Lifestyle & Cash-flow Planning: Cash flow modelling can be one of the first, and most useful, steps in creating a financial roadmap for a newly divorced client. We can help clients complete a budgeting exercise in order to calculate the quantum of financial settlement required to accomplish a clean break.

Investment Advice: We retain relationships with a wide range of discretionary fund managers, ensuring that we have an investment solution that will meet our clients' needs. Once clients have a portfolio in place, we keep their investments under independent oversight.

International Clients: We have dealt with a wide range of jurisdictions and are comfortable with complex structures including trusts, foundations and offshore companies.

Insurance: We can establish insurance policies to protect maintenance payments to either pay a lump sum or regular income in the event of death or ill-health. This can, for example, be arranged to protect child maintenance payments until they are due to end.

Financial Settlement: Post-divorce, we provide advice on how individuals should plan their affairs. This typically involves setting realistic objectives, agreeing expenditure requirements, minimising tax liabilities and quantifying necessary investment risk. We take a 'hands on' approach to ensure that clients are well looked after during a delicate period in their lives.

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Background

Strabens Hall was founded in 2007 as an independent fee-based wealth advisory business. In 2018 we were recognised by Citywealth as the "Financial Advisory Firm of the Year". We are Chartered Financial Planners and have corporate Chartered status.

Our clients are private individuals and owner managed businesses, with many having an international footprint.

Our company was initially established in London in 2007 and we opened a further office in Hong Kong in 2015. Our international presence helps us to advise clients with a profile in multiple jurisdictions, either as non-UK resident individuals or UK resident non-domiciled individuals.

Our Team

The team at Strabens Hall have a wealth of experience advising on all financial aspects of divorce. We have supported clients and their advisers through the most challenging cases and routinely deal with high value claims and settlements involving:

- Pensions
- Complex trust structures
- Illiquid assets and unquoted investments
- Non-UK situs assets
- Significant businesses
- Inherited wealth
- Tax concerns
- International issues

What sets us apart?

- **Independence** We are independent financial advisers and therefore consider every relevant product and solution when providing advice.
- **Resolution** As members of Resolution we support Resolution's Code of Practice. Namely, helping deal with separation in a constructive manner, and encouraging agreements where possible.
- **Transparency** We offer transparent fee structures with no hidden commissions which aligns our interests with those of our clients.
- **Expertise and Innovation** We establish innovative and thoughtful solutions which are then managed through changes of regulations and tax, working with leaders in legal, accounting and other technical fields. Our firm has corporate Chartered status.

Highlights

Award winning firm with a history of advising family solicitors and their clients on financial matters. We have advised on:

- Pension sharing
- Overseas trusts & structures
- Income, Lifestyle & Cash-flow Planning
- Management of Financial Settlements
- Investment Management
- Mediated and Collaborated Settlements
- Trusts & Divorce
- Insurance of Maintenance Payments



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Contact us

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