

Imogen Holmes

Partner

Nottingham

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Imogen has 15 years' experience of acting on a wide range of private client related matters.

She advises on and supports decision making in relation to estate and succession planning, drafting wills and trusts, inheritance tax planning and wealth protection with a focus on practical provision and structuring for business owners, farming families and within estate and trust administration.

Imogen works nationally across our offices and acts for many family-owned estates and businesses with a view to preserving and securing key assets, tax reliefs and family harmony.

She also has a background in providing advice to families with disabilities and on mental capacity, care provision and funding issues.

Imogen is a member of STEP.

Expertise

Estates and rural

Private clients

Featured experience

Landed Estate

Administration of a landed estate including extensive forestry and multiple renewable energy projects.

Family Trusts

Advising on restructuring of connected family trusts to meet the needs of key beneficiaries and to achieve an improved outcome for IHT purposes. A mindful and pragmatic approach taken given the competing interests and complex management arrangements.

Family Business Succession

Supporting the founders to make long term decisions about the best structure for their family businesses and wealth in line with future objectives.

Testimonials

"Imogen is experienced in delivering private client services. She has expertise across a range of areas, including: succession and inheritance tax planning, trusts and estate planning for business and agricultural assets. Holmes also specialises in contentious trust and estate matters, as well as mental capacity issues. "

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