Rathbone Trust Company

www.rathbones.com

Rathbones

Family office services

RATHBONES
Established 1742

Welcome to Rathbones

"We do not sell products – we offer a service. For us, that is an important distinction. We aim to build long-term relationships with individuals, their families and advisers."

Mark Powell
Chairman
Rathbone Brothers Plc

Private individuals and their families expect their advisers to be able to deliver skilled, high-quality advice. However it is equally important to them that their advisers take the time to listen and understand what their needs are.

Rathbone Brothers Plc is a long-established, leading provider of investment and wealth management services that has established a strong reputation for stability and permanence. It remains an independent company with a London Stock Exchange listing. It focuses on the needs of private clients alongside those of charities and our advisors service both these groups.

Our family office service draws together our expertise in providing tax advice and the management of trusts and estates. It has been built up by Rathbone Brothers which, itself, has grown out of a family office established over 100 years ago.

We manage the affairs of many large families and the investments of several thousand individuals. At our offices in New Bond Street, you will find our trust and tax advisors, lawyers and investments professionals all dedicated to serving your needs.

The team

Linda Cousins
Trust Director

Linda Cousins joined Rathbone Trust Company Limited from Kleinwort Benson Private Bank. She is an associate of the Institute of Bankers and completed the old style Trustee Diploma. At Kleinworts Linda was responsible for the trusts and financial affairs of the founding families, and subsequently, had overall responsibility for their trustee department. Linda began her career at National Westminster Bank in 1974.
linda.cousins@rathbones.com

Kevin Custis
Trust Director

Kevin Custis specialises in trust creation, administration and associated tax advice, together with long experience of estate and personal tax planning, and executorship work.

He joined Rathbones from Kleinwort Benson Trustees Limited and before that held roles with leading law and accountancy firms in London. Kevin is a registered trust and estate practitioner, and the secretary of the London Central Branch of the Society of Trust and Estate Practitioners (STEP) whist serving on a number of London and nationwide STEP committees. He is also a contributing author to Lexis Nexis Buttorworth Tolley reference publications, lectures on trust and estate related topics, and serves as trustee and treasurer to a number of national and local charities.
kevin.custis@rathbones.com

Don McGilvray
Trust Director

Prior to joining Rathbones Don was a director of Kleinwort Benson Trustees Limited and Kleinwort Benson Private Bank where he was employed for 25 years specialising in private client advisory and trustee administration work. He is heavily involved in tax planning advice to offshore trustees and their interaction with UK beneficiaries and other UK trusts for family groups. Don is a registered trust and estate practitioner, has been a member of the Institute of Taxation since 1981, and has considerable experience in private client tax and trust work. He was an active member of the Association of Corporate Trustees' Tax committee for 12 years.

Don also acts as a personal trustee in a number of cases where additional trustees are required for tax or trust law reasons, and has carried out lectures for the Banker's Tax Circle on budget changes and capital taxes generally in the past.
don.mcgilvray@rathbones.com

Bruce Newbigging
Managing Director UK Trust

Bruce Newbigging joined Rathbones in 2002 having worked with Hambros for the previous 25 years managing its private bank and trust business for the majority of that time. He has gained a wide range of expertise and knowledge from over 30 years' practical experience in all areas of corporate, private and charity trust work. Bruce now specialises in family office services to wealthy clients and is also a trustee of a significant grant-giving foundation.
bruce.newbigging@rathbones.com

Tim Smith
Trust Director

Tim Smith is a director of Rathbone Trust Company Limited and has worked for over 20 years in the fields of estate planning and financial services generally. He joined Rathbones in 2000, having previously worked in the City since 1982. He has been a Chartered Tax Adviser since 1986 and is also a member of the Society of Trust and Estate Practitioners.
tim.smith@rathbones.com

Julian Whately
Senior Trust Director

Julian Whately advises on wills, trusts, capital tax planning and probate matters. He is also trustee of a number of trusts, including a substantial grant-making charity and a large, rural landed estate. He has over 30 years' experience of looking after individuals and families, and their diverse interests, advising on how best to deal with ownership of assets between generations and providing practical and informed solutions to their legal problems.

Julian Whately joined Rathbone Trust Company in May 2009 as a director. He was a solicitor in a private practice for many years and brought with him a following of high net worth families and individuals. Prior to joining Rathbone Trust Company, Julian had been senior partner of Lee & Pembertons for seven years.

Rooper & Whately, under which Julian provides legal advice to his clients, was originally founded in the late 19th century. It merged with Lee & Pembertons in 1970 but is now a separate entity again under Julian's direction.
julian.whately@rathbones.com

Family office services

What we offer to you

Taxation
The rules and regulations on taxation never stay still, nor do they reduce in complexity. Our highly-trained and experienced tax professionals will provide you with on-going advice on your overall affairs to ensure these remain appropriately structured. We ensure that our clients meet the rules of HMRC with respect to returns and filing requirements, so you can be assured that your tax affairs are in good order, and the planning you have carried out is effective.

Trusts
Trusts have been used since medieval times as vehicles to protect and manage the assets of wealthy families and to ensure their devolution through successive generations. We advise on the role of trusts, both on and offshore, and their suitability for your individual circumstances. We can set up, run and administer trusts, and can act as your trustee if appropriate.

Estate planning
Whether or not we have been appointed as executor of the will, we can manage the administration of an estate to ensure that the testator's wishes, as expressed in the will, are carried out. We can prepare wills and all the necessary financial statements and tax returns that are needed for the administration of a deceased's estate whilst ensuring that the requirements of HMRC are met.

Charity creation and administration
Many wealthy individuals and families are philanthropically minded and require advice on charitable giving. This advice may include the creation and administration of private family charities, as well as dealing with the Charity Commission. We have wide experience in this area and are members of the Society of Estate and Trust Practitioners' charities group.

Legal services
Although a number of our clients retain their own solicitors, and we are always pleased to work alongside them, through the firm of Rooper & Whately we can now provide a comprehensive private client legal service. This includes advice on matters such as oaths, wills, probate, trust law, capital tax planning and the preparation and completion of all associated legal documentation.

Contact us

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