



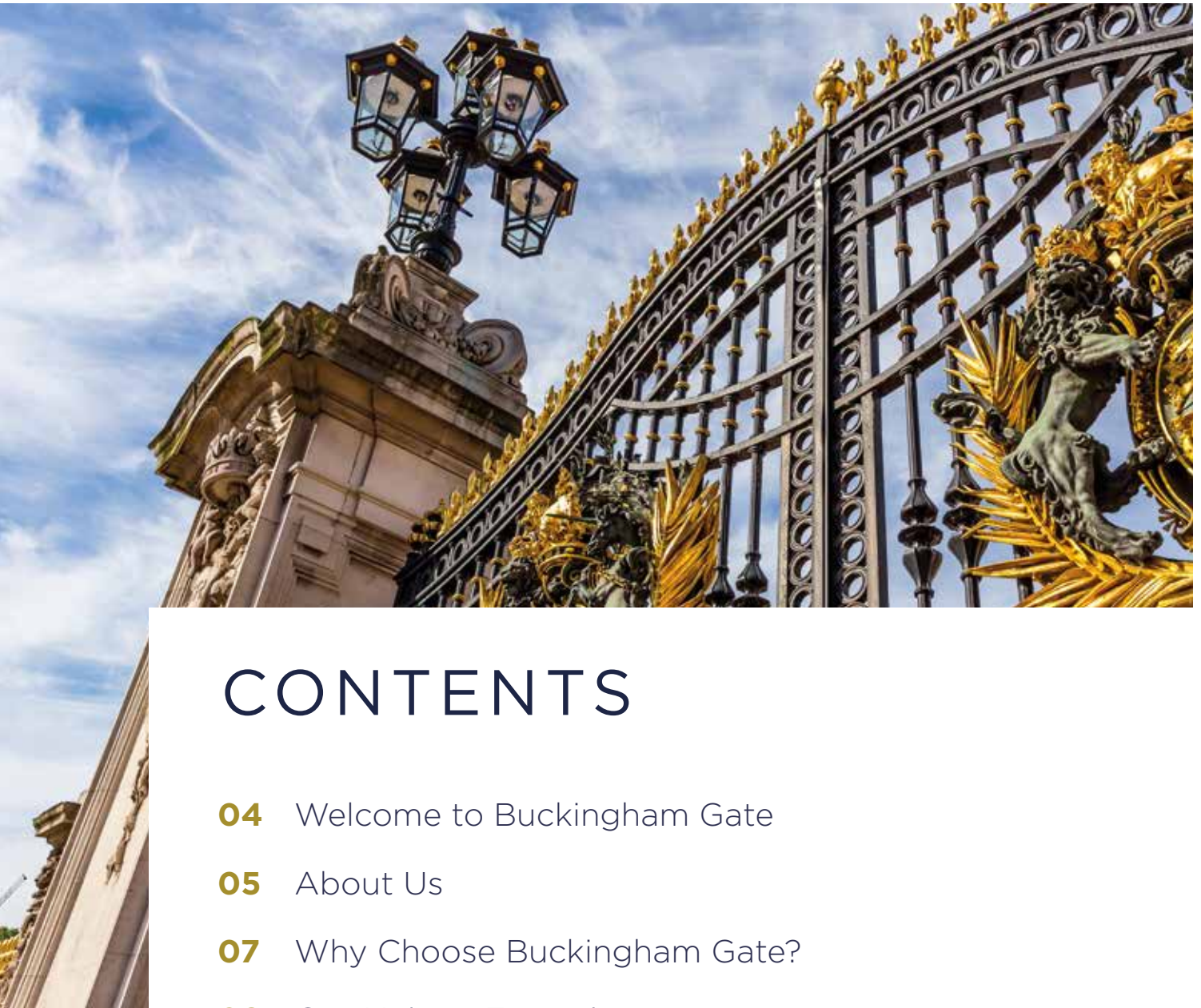
# BUCKINGHAM GATE

YOUR GUIDE TO  
BUCKINGHAM GATE



**Our mission** is to empower our clients and their families to enjoy their wealth and to help them achieve true financial peace of mind.

With the most dedicated team in Estate Planning, we make this possible by creating simplicity out of complexity and acting as the guardians of our clients' financial wellbeing.



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# WELCOME TO BUCKINGHAM GATE

At Buckingham Gate, our team of Independent Estate Planning Professionals are focused on providing a truly exceptional service as part of a long-term relationship. We always take the necessary time to fully understand you, your family and your Estate Planning objectives to allow us to craft a comprehensive Estate Planning strategy to protect your legacy for generations to come.

We understand that every family is different, and your Estate Planning objectives will be as unique as you are. You may simply be wishing to simplify your estate and minimise the workload for your family when you are no longer here. Many clients will naturally be worried about the potential Inheritance Tax liability on their estate and what impact this might have on their legacy. Others will be concerned with so called 'social impacts' such as divorce or bankruptcy and how this might impact on what they leave behind.

Whatever your requirements, your Estate Planner will work with you to find out what's really important and then create a bespoke solution to ensure that you meet your objectives.

We hope this guide provides you with an overview and insight into the different ways in which we will add value to you as a client of Buckingham Gate. Our dedication to client service and our straightforward fee structure mean that we only work on your behalf.



## ABOUT US

At Buckingham Gate we have done things differently from the start. We only offer independent Estate Planning advice from a fully qualified Estate Planner. We have a simple and transparent fee structure, which we will set out in writing before we commence working on your behalf and we always ensure we can add value before starting work for a client.

We combine the latest technology with a highly personal, relationship-based approach, meaning our clients receive a truly joined up Estate Planning service.

### **FORGING A LONG-TERM RELATIONSHIP**

We strive to provide an exceptional service to our clients, helping them to achieve their Estate Planning objectives and protecting legacies for generations to come.

We often work with several generations of the same family to ensure that the plan is truly joined up.

We are also there to support families when a loved one passes away with our range of probate and support services.



### **GETTING TO KNOW YOU AND YOUR FAMILY**

We are based in central London with our main office on King William Street, just outside Monument Station, however we serve clients from across the UK.

The first step in our Estate Planning process is a Discovery Meeting, where we take the time to really get to know you and your family and gain a greater understanding of your Estate Planning objectives.

We would love the opportunity to explain how we can add value to your Estate Planning which is why we offer all new clients a Discovery Meeting for only £197.

# WHY CHOOSE BUCKINGHAM GATE?

There are many reasons why you might choose to appoint Buckingham Gate as your Estate Planning partner.

## HERE WE'VE PROVIDED JUST A FEW:



### **Life-changing Estate Planning**

We believe that Estate Planning has the power to change the lives of you and your loved ones. Our work often saves families from the financial strife that can be caused by a divorce or bankruptcy, leaves beneficiaries hundreds of thousands of pounds better off with our Inheritance Tax mitigation work and minimises stress and hassle at what is invariably a difficult time.



### **We take the time to listen to you**

With our clients' permission we like to record our meetings. This means that we actually spend our time with you focused on you, rather than furiously typing into a laptop. We find we leave with a much greater understanding of you and your needs, meaning we can provide high-quality and technically superb Estate Planning advice.



### **We let you be the judge of our success**

At the end of our first meeting, your Estate Planner will always ask you how you will judge our success. This is important so that we can deliver the particular type of service that you are looking for. Some clients will be concerned with minimising their potential Inheritance Tax liabilities, others will be worried about the impact of a future divorce or separation on a beneficiary. Some will simply be concerned with leaving the best legacy possible. Whatever your priorities, we always aim to tailor our services to deliver your desired outcomes.



### **The latest technology when you want it, a real person when you don't**

At Buckingham Gate we have fully embraced the latest technology, meaning that our clients are connected to their Estate Plan 24/7. With that in mind, we still believe that a personal relationship with your Estate Planner is the cornerstone of implementing an effective strategy.



**A fee structure giving us only one focus**

We have developed a simple and transparent fee structure that means you will always know in advance exactly how much you will pay for our advice, services and expertise.



**Estate Planning reports you actually want to read**

At Buckingham Gate we pride ourselves on producing beautiful, engaging Estate Planning reports giving you all of the information you want to read and none of the information you don't. We refer to and update this report at each subsequent meeting so that we can monitor your progress towards your goals.



**Award-winning service - as voted by our clients**

Buckingham Gate is proud to have been awarded several professional accolades and our clients consistently praise our service and expertise. You can see what they have to say by visiting: [www.buckinghamgate.co.uk/stories](http://www.buckinghamgate.co.uk/stories).



VOTED **SOLIDUS**  
ESTATE PLANNER  
OF THE YEAR -  
5 YEARS IN A ROW.







# OUR UNIQUE EXPERTISE

Our unique expertise at Buckingham Gate centres around our ability to demystify the often complex world of Estate Planning and present our advice to you in simple and concise manner.

We have built a team of some of the most highly qualified Estate Planning professionals in the country, each with their own area of specialist expertise. While you will always have a single point of contact with your individual Estate Planner, we work on a collaborative basis, meaning that you have decades of experience brought to bear on your Estate Plan.

Our Estate Planning work simplifies things for your loves ones, often creates six or seven figure reductions in your potential Inheritance Tax liabilities and protects assets against the key 'social impacts' such as the divorce or bankruptcy of a beneficiary.



# ESTATE PLANNING

Our estate planning work with clients delivers solutions for three key problem areas:



## **Inheritance Tax Mitigation**

Many of our clients are understandably concerned about the level of Inheritance Tax that might be due on their estates. We help clients implement advanced, non-contentious estate planning solutions, which often result in tax savings running into six figures or more.



## **Bloodline Protection**

While Inheritance Tax savings are of course desirable, many estate plans often overlook the other large threat to family wealth.

We would broadly classify this second type of threat as 'social impacts', which could include the re-marriage of a spouse, the divorce of a child or the bankruptcy of a beneficiary, all of which can have a far larger impact on an estate than Inheritance Tax.

For this reason, all of our estate planning solutions for clients consider the need to protect their estate, as well as minimise tax, and we will often include specific bloodline protection to ensure that family wealth remains in the family.



## **Estate Simplification**

No one wants to leave a mess for their family when they die, but so often we do so unconsciously. Our Independent Estate Planners will act as your critical friend to help you see some of the complexities you may be blind to.

As part of our estate planning work with clients we always look to simplify the estate if possible, to ensure that things are as easy as possible for those that we leave behind.



**Our aim:** To cut through the numerous layers of complexity inherent in the Estate Planning world and present our advice to you in a simple, concise manner.

## WHAT NEXT?

We hope that this guide has given you all of the information you need to make an informed decision about who to appoint as your Estate planner. You might like to ask the following questions as you make your decision:

- What are your qualifications?
- What experience do you have?
- What services do you offer?
- What is your approach to Estate Planning?
- Will you be the only person working with me?
- How will I pay for your services and how much do you charge?
- How often will you review my situation?
- Will you let me have details of your service in writing?



### WANT TO FIND OUT MORE?

To learn more about the services Buckingham Gate provide or to request your initial discovery meeting, please contact us –

**telephone:** 0203 478 2160, or

**e-mail:** [contact@buckinghamgate.co.uk](mailto:contact@buckinghamgate.co.uk)

– we look forward to hearing from you.

You can also visit our

**website:** [www.buckinghamgate.co.uk](http://www.buckinghamgate.co.uk)



## **Buckingham Gate Estate Planning**

68 King William Street,  
London, EC4N 7HR

**Tel:** 0203 478 2160

**Email:** [contact@buckinghamgate.co.uk](mailto:contact@buckinghamgate.co.uk)

**Web:** [www.buckinghamgate.co.uk](http://www.buckinghamgate.co.uk)

Registered address: 6th Floor, 60 Gracechurch Street, London EC3V 0HR.

Registered in England & Wales – Company No: 14693830.