



Matheson

Private Client

“ Matheson sets the standard for service, substance and responsiveness ”

International Law Office, Client Choice Award

The primary focus of Matheson is to serve the Irish legal needs of internationally focused companies and financial institutions doing business in and from Ireland. Our clients include the majority of the Fortune 100 companies. We also advise 7 of the top 10 global technology brands and over half of the world's 50 largest banks. We are headquartered in Dublin and also have offices in London, New York and Palo Alto. More than 600 people work across our four offices, including 74 partners and tax principals and over 350 legal and tax professionals.

The lawyers in our Private Client Department provide tax, estate planning and wealth preservation / asset protection advice to Irish and international individuals, families and their investment advisors. Our approach is to provide comprehensive and integrated legal and capital tax solutions for our clients. Our lawyers work closely with corporate tax / colleagues to provide integrated tax and legal solutions for families and their businesses.

We also advise professional and family trustees on the full range of issues affecting them and their clients and a wide range of charitable bodies in relation to their activities. When dealing with sophisticated families and their requirements, our lawyers aim to develop an understanding of their immediate and longer-term needs so that they can be fulfilled in a timely and orderly fashion. We pride ourselves on a client-driven commercial approach.

We offer a tailored service for high value individuals relocating to Ireland for assignments or on a more permanent basis. We advise on their pre-entry tax planning and the implications of their long term Irish residence on wealth held in family structures.

We advise clients on their tax obligations and assist them in making an appropriate disclosure of matters and negotiating tax liabilities.

We implement long term strategic planning to mitigate the risk of trust and estate disputes. Where disputes and claims arise, our lawyers advise trustees / executors and also claimant beneficiaries on all means of redress including litigation and mediation.

Practice areas

Our Private Client lawyers advise on:

- Estate Planning / Wills
- Administration of Estates / Succession law
- Trust and Partnership Structuring
- A full relocation service
- Trust Disputes
- Will Disputes
- Private Client Property
- Charities
- Capacity

We work closely with clients on a number of developments impacting private clients in Ireland. Whether advising on international trusts (from a taxation, trustee or beneficiary perspective) or dealing with the preparation of complex estate plans involving a number of jurisdictions, and the administration of estates with significant legal and tax issues, our experience is at the forefront of such practice in this jurisdiction.

We have extensive experience in trust and estate litigation, which has grown significantly in volume and complexity in recent years. We act for executors and trustees in defending their position. We also act for claimants, including spouses and children in challenging domestic or offshore trustees, or in bringing contentious estate claims.

Recent experience

- Advising Irish resident and domiciled clients on parent controlled gifting structures to take advantage of reduced asset values in large Irish businesses.
- Advising high net worth Irish domiciled, UK and US resident individuals on their estate plans involving assets in multiple jurisdictions.
- Advising Irish trustees providing trust services to non-Irish families.
- Advising on the Irish tax implications of offshore trust structures, including minimizing Irish tax exposures through voluntary disclosure.
- Advising individuals moving to Ireland on pre-entry planning to mitigate exposure to Irish capital tax.
- Advising on the legal and tax aspects of a trust dispute on behalf of a branch of a family concerning a valuable business.
- Advising claimant child and spouse beneficiaries of large Irish and international estates.
- Advising on multiple will challenges both for executors and plaintiff beneficiaries.
- Advising on succession law issues involving estates with complex tax profiles and assets in multiple jurisdictions.

Contacts



Paraic Madigan

PARTNER

E paraic.madigan@matheson.com



John Gill

PARTNER

E john.gill@matheson.com