



INHERITANCE TAX PLANNING & ESTATE COORDINATION

TERMS OF BUSINESS

Initial Observation Meeting

- A £99 reservation fee is required to secure your private Initial Observation Meeting and allow preparation of your Initial Observation Report.
- This fee acts as a holding deposit to cover administration, preparation time, and meeting allocation.
- The £99 reservation fee is fully refundable upon attendance at your scheduled meeting at our London office.
- If you fail to attend the meeting without reasonable notice, the reservation fee may be retained to cover preparation and scheduling costs already incurred.
- Your Initial Observation Report is designed as a high-level educational and structural overview of potential inheritance tax and estate organisation matters identified during the initial review process.
- The report is typically reviewed privately during a face-to-face meeting at our London office. A PDF copy of the report will then be provided following the meeting.
- The Initial Observation Report and meeting are educational and strategic in nature only and do not constitute regulated financial advice, investment advice, tax advice, or legal advice.
- Where regulated advice is required, this would always be handled separately by appropriately authorised third-party professionals.
- Reports are prepared based upon the information provided by the client and may be affected where information supplied is incomplete, inaccurate, or unavailable.
- Initial Observation Reports are typically prepared within approximately five working days, depending on workload and receipt of the necessary information.

London Office / By appointment only

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