Private Client Tax Service

Helping you plan, protect and pass on your wealth with confidence

Delivered by experienced specialists, tailored to your goals

Forrester Boyd
CHARTERED ACCOUNTANTS

Working with you to shape your future

Supporting you at every stage of your journey - from building wealth to passing it on.

At Forrester Boyd, we understand that managing personal wealth is about far more than tax. It is about protecting what matters most, planning for the future and ensuring your affairs are structured in a way that reflects your values, family circumstances and long-term ambitions.

As a Private Clients team, we work closely with individuals, families and business owners to provide clear, practical advice in an increasingly complex tax and regulatory environment.

Our role is to support you throughout your entire journey - from the early stages of your career or business, through growth and wealth creation, to long-term succession planning and the transfer of wealth to the next generation.

We aim to simplify complexity, identify opportunities and ensure you remain well positioned at every stage, both now and for the future.

Our Approach to Private Client Advice

We believe effective advice starts with understanding you. Our approach is three-fold**: Understanding what matters most, Shaping the right strategy, Supporting you every step of the way.**

The Foundation
of our approach is straightforward

Understand your position
We take time to understand your personal and financial circumstances, including ownership structures, family considerations and future plans.

Identify risks and opportunities
We assess your current position in the context of tax legislation and highlight potential exposures and planning opportunities.

Ongoing review and compliance oversight
Tax rules and personal circumstances evolve. We provide ongoing advice and regular reviews to ensure your plans remain appropriate, effective and aligned with your objectives.

Structure advice around your goals

We develop tailored solutions that align with what matters most to you - whether that is protecting wealth, reducing tax exposure or planning succession.

Our advice is always clear, concise and delivered without unnecessary jargon, following a structured, stepped approach so you have full clarity around the scope of each project, the options available and the decisions being made.

Ensure end-to-end support

We provide full support in implementing agreed planning, ensuring that all structures are appropriately established, obligations are met and ongoing reporting and compliance requirements are handled effectively.

We aim to support you throughout the full lifecycle of your financial journey, from early creation and growth through to succession and the transfer of wealth to the next generation, ensuring continuity and consistency of advice.

The Services we offer

Protecting and Managing Your Wealth

Personal tax compliance and returns

We provide full support with Self-Assessment tax returns and ongoing compliance, ensuring your affairs are accurately reported and all obligations are met in a timely and efficient manner.

Making Tax Digital (MTD) and digital compliance

We help you navigate evolving digital reporting requirements, ensuring systems and processes are in place to meet MTD obligations efficiently.

Residence, domicile and international aspects

We advise individuals with international connections on residence status, domicile considerations and cross-border tax implications, helping to manage exposure across different jurisdictions.

HMRC enquiries and risk management

We support clients through HMRC enquiries and carry out proactive reviews of existing structures to identify and manage potential risks before issues arise.

Building and Growing Wealth

TAX-EFFICIENT INVESTMENTS

We provide guidance on structuring investments in a tax-efficient manner, making effective use of available allowances, reliefs and wrappers in line with your wider financial objectives.

REMUNERATION & PROFIT EXTRACTION PLANNING

We work with business owners to structure remuneration efficiently, balancing salary, dividends and other income streams in a way that aligns with both personal and business goals.

PARTNERSHIPS AND PARTNERSHIP TAXATION

We advise on partnership structures, profit allocation and compliance, ensuring arrangements remain appropriate as businesses grow and evolve.

Structuring Wealth & Assets

CAPITAL GAINS TAX PLANNING

We advise on disposals, reorganisations and asset transfers, helping you manage CGT exposure and take advantage of available reliefs where appropriate.

PROPERTY TAX MATTERS

We provide advice on the tax implications of acquiring, holding and disposing of property, including ownership structures, reporting requirements and ongoing tax efficiency.

TRUST CREATION, ADMINISTRATION & ACCOUNTS

We support the establishment of trusts as part of wider planning and provide ongoing administration, accounting and tax compliance to ensure they operate effectively.

Preserving & Transferring Wealth

INHERITANCE TAX & SUCCESSION PLANNING

We help you develop long-term strategies to preserve and pass on wealth, ensuring your affairs are structured to reflect your wishes and protect future generations.

CORPORATE RESTRUCTURING & SUCCESSION PLANNING

For business owners, we provide advice on structuring and reorganising businesses to facilitate succession, support exit planning and ensure a smooth transition.

AGRICULTURAL & LANDED ESTATE PLANNING

We advise on the specific complexities of agricultural and landed estates, including succession planning and the application of key reliefs such as Agricultural Property Relief and Business Relief.

We take a holistic approach, delivering our services cohesively so that each element works together effectively.

+ Why work with Forrester Boyd?

Working with Forrester Boyd means benefiting from experienced, senior-led advice that is tailored to your individual circumstances and delivered with clarity and practicality.

Our Private Clients team brings together a breadth and depth of experience across all aspects of personal tax and wealth planning. More importantly, we focus on providing personal, objective-driven support, led by senior advisers who understand the wider strategic picture and contribute forward-thinking insight, not just technical analysis.

You will work with advisers who are not only technically strong, but who take the time to understand your goals and provide thoughtful, structured guidance to help you make confident, well-informed decisions.

What Sets Us Apart

We recognise that many firms offer tax services. Our senior team are hands on, involved and present to deliver tailored solutions bespoke to your needs.

Our clients benefit from:

Senior-led advice

Direct access to experienced specialists.

Integrated thinking

Alignment between personal, business and succession planning.

Clarity over complexity

Clear, understandable, purposeful advice.

Forward-looking planning

Anticipating change rather than reacting to it.

Tailored Strategies

No 'off the shelf' solutions.

Client Experience - Above all, it's all about you

Client satisfaction is our ultimate goal. This is why we invest in the training and development of our staff, ensuring we have a happy and motivated team, technically equipped to deliver high quality advice.

Taking care of our staff, helps to ensure they take care of you. It's just the way we do things and we hope that our ethos shines through in your day to day experience with us.

Meet The Team

Private Client Tax Senior Team

Friendly & Approachable | Qualified Specialists | Years of Experience

Kim Major

Private Client Tax Partner

My role as private client tax partner involves supporting individuals, families, business owners and trustees across our broad client base, providing tailored tax planning and asset structuring advice across income tax, capital gains tax, inheritance tax and stamp duty.

My approach is objective-led and personal, helping clients to accumulate, shape and grow their wealth in tax-efficient structures, always with their wider family and long-term goals in mind.

Vicky Prior

Partner - Chartered Tax Adviser

I spent a number of years advising high net worth families on tax planning and trusts before making a jump to corporate tax. I then spent time advising on corporate tax planning and business reconstructions, before returning to a more ‘mixed tax’ role.

I now oversee both our personal and corporate tax staff and find my broad background extremely helpful in advising owner managed businesses.

Matthew Robinson

Senior Tax Manager - Chartered Tax Adviser

My expertise focuses on supporting private clients, individuals, and owner-managed businesses with tailored tax planning and strategic financial advice.

For business owners, I provide guidance on a wide range of tax planning matters, including business start-ups, remuneration strategies, business restructuring, and exit planning, helping clients make informed decisions at every stage of their business journey.

For individuals, I offer advice across all aspects of personal taxation, including Capital Gains Tax planning, bespoke Inheritance Tax strategies, and the use of family trusts where appropriate to support tax-efficient wealth preservation and succession planning.

James Burnett

Corporate Tax Senior Manager

As a senior corporate tax specialist, I work closely with the private client team to support owner-managed businesses and their shareholders in structuring their affairs effectively. With business reconstructions becoming increasingly prevalent as a tax planning tool, my role is to integrate personal and corporate tax considerations, ensuring a complete and comprehensive approach.

Above all else, the tax team focuses on building long-term relationships, providing clear guidance and practical advice that evolves with your financial journey.

A cuppa and a conversation - what's not to like?

Let's talk… whether you are building wealth, planning for the future or thinking about succession, we may be able to offer a fresh perspective on your personal affairs and tax position. The right conversation can make all the difference.

Contact us today for a no-obligation conversation - what have you got to lose?

Find our contact details on the reverse side of this page.

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Our Offices:

We have offices throughout Lincolnshire and Yorkshire. To view our offices and their individual contact details please scan the QR Code to the right.

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building better together.

agn INTERNATIONAL AFFILIATE