

# Our Private Client services



## Our Private Client services

**We specialise in UK tax offering a personal and professional service – and with PKF’s global reach of over 150 countries, we can provide worldwide tax coverage should you need it.**

Our trusted experts deal with clients both large and small, including self-made entrepreneurs, those with family wealth, and those who are enjoying retirement. Whatever your situation, our aim is to help you navigate the potential minefield of tax obligations regarding income, capital gains and inheritance – ensuring that you understand what is required and when, assisting you to file the various returns, and to pay the correct amount of tax when it is due.

### How does PKF Private Client work?

We know no two clients are the same, as such our focus is on understanding your needs so we can work in partnership with you to simplify the complexity and proactively provide timely tax advice and support.

At PKF Private Client all client relationships are led by a Partner or Director. Our focus is building lasting relationships with our clients that allow us to offer proactive advice. Our teams have smaller client allocations compared to most firms allowing them to focus on providing focused and responsive service to our clients.

When meeting new clients we:

1. Like to have a complementary introductory meeting or call. Usually this will last 30 minutes to 1 hour.

We like to meet clients in person but understand that isn’t always possible, as such, we can arrange a Teams or Zoom meeting or phone call.

This meeting will focus on understanding your circumstance and needs. We will build up a picture of your financial affairs and what your needs are. This meeting will also give you the opportunity to find out more about PKF and meet the team that will be working with you.

2. Following the meeting we will prepare a tailored quote and a time frame for delivering your tax advice. We have set out details of our charge out rates and typical fees below.

If you would like to proceed with PKF we will need to complete our KYC checks, to do this we will need:

- A copy of your passport or driving licence
- A utility bill from within the past three months.

Once we have completed our KYC checks we can issue an Engagement Letter.

We will also send a new client questionnaire for you to complete to make sure we have a full picture of your financial situation and needs.

3. Once you are onboarded you will also be assigned a manager who will work with the relationship lead. Both the partner and manager will act as your main points of contact throughout your relationship with PKF Private Client.



## Our team



**Stephen Kenny**  
Partner

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Stephen heads up the Private Client Team at PKF and has over 15 year experience. His expertise covers non domicile and residence, advice on investing in the UK, and family wealth planning, as well as support with taxes such as Capital Gains Tax and Inheritance Tax.

In addition, Stephen has significant expertise in the private equity and venture capital fund sector, covering fund structuring, EIS/CT tax reliefs for investors, tax support to the wealth management industry, the taxation of cryptoassets, and business lifecycle planning, including providing tax advice to management teams on exit.



**Karen Ozen**  
Director

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Karen is an Associate Director and is responsible for the efficient and effective operation of the Private Client team.

Karen works with clients to help them understand their tax compliance obligations and tax liabilities and to assist them to comply with those obligations, advising on income tax, Capital Gains Tax and Inheritance Tax issues, including estate planning, residency, trust tax, rental income and furnished holiday lets. She advises individuals connected to the Lloyd's of London insurance market, including those who underwrite through a corporate vehicle as well as members of Lloyd's.



**Phil Clayton**  
Director

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Phil is a Director in the Private Client Tax team with over 10 years' experience, primarily focusing on individuals' personal tax affairs. Phil specialises in advising entrepreneurs, business owners and management teams.

Phil advises his clients on all stages in the business lifecycle from initial structuring, growth to disposals. This includes structuring their business for the efficient extraction of funds, along with business exits, takeovers or passing onto the next generation.

Phil prides himself on understanding his clients business and their plans, providing proactive advice throughout any transaction, and ensuring the individual personal tax implications have been fully considered to meet his clients' objectives. Phil also helps clients with the broader tax planning opportunities following a transactional event, including estate planning.





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