



# Private *Client* —

SHORTS

Our team are specialists in trusts, wills, estate planning and personal tax. Our market-leading service gives you a complete and uninterrupted view of your finances – business to personal, one generation to the next, present to future. By understanding your business and its goals, as well as your own personal ambitions, we're in a great position to optimise your finances to create the best possible future.

There are three key ingredients to Private Client...

1. — *Approach*
2. — *Experience*
3. — *Expertise*



# Approach



From managing your tax, pensions and investments, to advising on the use of trusts for asset protection, our seamless service delivers because our specialists really listen, understand and work with you to plan for tomorrow.

And because we feel privileged to advise on what might be the legacy of a lifetime's work, or in helping you achieve a lifelong ambition, we're as invested in your future as you are.

We are:

## Personal

We focus on building strong open relationships with our clients because we understand that people do business with people they know, like and trust.

## Experienced

Our service is built upon the considerable expertise of our team, all of whom have decades of experience in advising on Private Client matters.

## Reliable

Trust matters to our clients, so it means everything to us that we offer them the very best advice and service.

## Confident

We embrace the complex and are perfectly placed to make sense of it. Providing our clients with tailored multi-layered solutions, which achieve their objectives.



# Experience

Shorts in numbers

There are over 41,000 pages of tax legislation. That's why you need our team of experts to help you.

41k

We go the whole nine yards.

9

15

We currently employ 15 Chartered Tax Advisers, more than any other local independent accountant.

100%

Our specialists spend all of their time advising on Private Client matters.

# Expertise



## Chris Chambers

Partner —

Over the 30 years plus that Chris has worked at Shorts, he has seen growth from a small, locally focussed accountancy firm to a substantial forward thinking, high calibre team of multi-disciplined professionals. As the longest serving partner currently at the firm, he is also very proud to be part of this ongoing journey.

During that time, he has become more than your 'average tax partner' due to the varied and interesting nature of the clients at Shorts, which has led him to combine a wide variety of tax skills with pensions and investment expertise to provide a 'complete' service to his clients.

As Head of Private Client, he is delighted to have been instrumental in developing a top-quality team that is more than capable of dealing with the most complex problems – Shorts thrive on the complicated!

### Expertise —

- Senior partner
- Chartered Tax Adviser
- Chartered Financial Planner
- Previous experience with both HMRC and Grant Thornton
- Over 30 years at Shorts
- Profound breadth of knowledge across all areas of taxation
- Successful negotiator

**Very quickly we knew  
that our interests were  
in good hands.**

*Julia Proctor  
Sheaf Motors Limited*



# Expertise



## Rachael Dronfield

Director —————

Rachael is a Chartered Tax Adviser and Chartered Financial Planner with full membership of the Society of Trusts and Estate Practitioners. This combination of skills helps Rachael to understand clients' circumstances from a variety of different angles to ensure the advice is comprehensive. With over 20 years of employment in tax and financial planning, she also has a wealth of experience on which to draw.

She has a keen interest in all Private Client matters, with deep specialisms in inheritance tax, succession planning, will drafting and trust matters, and she particularly enjoys getting to the heart of technical problems. Rachael believes in creating bespoke solutions for each client, whether it be in lifetime or following their death and this often involves 'thinking outside the box'. She also prides herself on being able to explain very complex situations in 'plain English'.

The success of the Private Client team at Shorts is borne out of a strong team ethic, which combines professionals from a wide range of different disciplines. Rachael embraces this collective environment, and she believes it brings out the best in her and the work that she does.

### Expertise —————

- Chartered Tax Adviser
- Chartered Financial Planner
- Full membership of and advanced qualification with the Society of Trusts and Estate Practitioners
- 13 years' experience with Grant Thornton
- Member of ICAEW Inheritance Tax and Trust working group
- Wide Private Client knowledge and experience, especially in relation to estate planning and the use of trusts



▲ ▲

**Their knowledge  
and expertise  
quickly identified  
a suitable solution.**

▼ ▼

Mr and Mrs M Southwell  
Direct Track Solutions Limited

Steven Strawther - Tax Manager









**Begin your journey with us today**

*Drop us a line to see how we can help  
create the best possible future for you.*

## Get in touch —

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Sharper Results.**



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