

Corporate Trustee Service



Countrywide Tax and Trust Corporation Ltd is an established Company providing Legal Services, Probate, Professional Executors and Professional Trustee Services and is part of the Countrywide Group of Companies.

A Trust Corporation is a business organised specifically for entering into fiduciary relationships with individuals, or organisations, to act as an Executor, Deputy, Guardian or Trustee, in administration of custodial arrangements, Estate and Trust Funds. Countrywide Tax & Trust Corporation Ltd also has vast experience in advising on and arranging Estate Planning.

In Detail

Being a Trust Corporation and employing our own Solicitors within our practice, allows improved efficiency in both applying for Grants of Probate and Trust work, whilst giving the client extra protection due to the requisite share capital required to be held by the Corporation.

Countrywide Tax & Trust Corporation Ltd, under UK legislation, are able to act as a sole Trustee, where often 2 Trustees or 2 Executors would be required.

The Corporation is headed up by the Directors Bob Massey, Clive Ponder, Spencer Tattam and Charlotte Ponder.

Bob Massey TEP DipPFS

Bob started work with Legal & General in 1983 and later became a specialist and primarily offered Estate Planning advice under the Inheritance Tax legislation from 1986 to high net worth clients. After qualifying through the Advanced Financial Planning Certificates in Pension & Investment and Tax & Trusts, he became an IFA in his own right.

Clive Ponder TEP

After beginning his successful career in the mining industry, the changes that were brought about meant a change of direction for Clive. Initially working for a company writing Wills, Clive then set up his own company dealing with Wills and later setup Countrywide Legal Services with Bob Massey. This is now Countrywide Tax & Trust Corporation Ltd.

Spencer Tattam TEP DipPFS

Spencer Tattam BA (Hons) DipPFS TEP | Technical Director: Worked for Countrywide Tax and Trust Corporation Ltd for over 13 years, 7 years in our Probate Department and the Estate Planning Helpline thereafter. Prior to this Spencer was a member of a compliance department for a local financial services company post-graduation. Spencer specialises in the taxation of Trusts and estates and also being a qualified IFA has an extensive knowledge of the interaction of estate planning and financial services products.

Charlotte Ponder TEP LL.B (Hons)

As the Legal Director at Countrywide Tax & Trust Corporation Ltd, Charlotte holds a key responsibility in overseeing the running of the Probate, Live Trusts and Processing teams as well as ensuring that the day-to-day operations run smoothly.

With a strong legal background, Charlotte is well placed to take on this demanding position, having worked in multiple areas of law before progressing to Countrywide and interacted directly with clients to explain complex concepts in a simple manner.

Following her studies and being called to the Bar, Charlotte's legal career began in family law. As well as providing a strong foundation for her legal experience to build upon, here she also witnessed many divorce cases involving high asset losses, sparking her interest in how such consequences could be prevented.

Bob, Clive, Charlotte and Spencer are full members of The Society of Trust and Estate Practitioners (STEP) who are the leading worldwide professional body for Practitioners in the fields of Trusts and Estates.

Benefits of Countrywide as Professional Trustees

- All of our staff are positively encouraged to enroll and become members of STEP;
- There are two further fully qualified members of STEP and around 14 affiliate members;
- We also employ Solicitors, Lawyers and other legally qualified staff.
- We have access to numerous In-house Independent Financial Advisers who can provide advice on Trust Investments to fellow IFAs or clients directly.

Fees

- We do not regularly levy an annual fee for simply being appointed as a Professional Trustee;
- Where possible, we aim to agree fees at the outset, based on our fixed fee charging structure.
- Our normal charging structure is based on a transactional only basis;
- If no work is undertaken, there will be no charge to the client. The administration can be arranged to keep on-going administration costs to a minimum to suit the clients' needs;
- On more technical cases, if an hourly rate is appropriate, this can be agreed in advance.

With our expertise and access to other relevant, mainly in-house, professionals, the Trust can be managed in a more efficient manner providing time and cost savings to the clients.