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Private clients

Tax solutions for you and your family

pem.

A photograph of a man and two children sitting at a table. The man is leaning over the table, looking down at a bowl of food. The children are also looking at the bowl. The scene is brightly lit, suggesting an indoor setting like a dining room or kitchen. A semi-transparent purple box is overlaid on the bottom half of the image, containing text.

Reduce tax and protect wealth

When it comes to managing money, PEM's Private Client team helps you and your family to focus on what's important. Through strong client relationships and a thorough understanding of your current situation and long-term aspirations we will help make your financial decisions easier, providing clear, tailored advice you can trust. Whatever stage you're at in your life, we will help you get the most out of your money.

How we can help

We take the time to understand different needs and priorities to help you to reduce tax and protect wealth.

Services we offer include:

Personal tax compliance

Let us take care of your tax compliance. Our team will work with you all year round to make sure your tax affairs are under control. We work with clients from many different backgrounds specialising in high net worth, self employed, company director and international. However complicated your tax affairs might seem, we can take away the headache.

Income tax planning

Our approach to income tax planning goes beyond simple compliance. Together we will consider your family and business circumstances to find appropriate solutions that evolve as tax rules change.

Capital gains tax planning

At PEM we believe in building long-lasting client relationships. We will work with you to plan for and reduce capital gains tax by maximising available reliefs including Private Residence Relief and Entrepreneur's Relief.

Inheritance tax planning

Our Inheritance tax specialists will help you plan to pass your family wealth and business assets to the right people at the right time, often working across the generations. Working with you, and where appropriate your legal advisers, we can review your wills to ensure they reflect your current wishes and are tax-efficient. We will help you to maximise all reliefs available including those for Business and Agricultural property. We offer down to earth advice on using trusts and other lifetime planning in a tax efficient way.

PEM is the largest firm of independent accountants based in Cambridge. We have extensive local knowledge and experience which we use for the benefit of our clients. We take a joined up, comprehensive and pragmatic approach and our advice is simple, clear and straightforward.

Testimonials

“As a new client I think that your level of service and professionalism is top notch and way ahead of many of the BIG firms that I have dealt with in the past. We believe that we have made an excellent choice.”

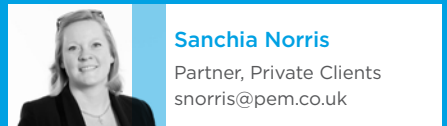
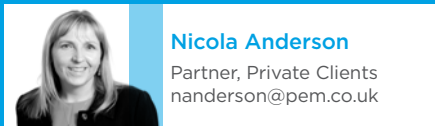
“My affairs are quite complicated with a few property interests, trusts and a large family. PEM are exceptional and very able. Not only do I appreciate their technical skills but also the personal care and attention they provide. There’s a depth of involvement there beyond the call of duty.”

“Thank you for putting together such a comprehensive and helpfully written report. It is very much appreciated and we have found it to be clear and focussed on the objectives which we discussed.”

Our private client team

We pride ourselves on giving clear and practical advice. By using our Private Client Team in Cambridge you can be assured that you have access to a team of experts who will enable you to move forward with confidence.

To discuss how we can help, please get in touch with Nicola Anderson or Sanchia Norris.



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