withersworldwide

Penelope Warr

PARTNER | LONDON

PENELOPE.WARR@WITHERSWORLDWIDE.COM

+44 20 7597 6093

CLIENT SERVICES CONTACT KIMBERLEY FERRIER

KIMBERLEY.FERRIER@WITHERSWORLDWIDE.COM

+44 20 7597 6348

Penny is a consultant in the private client and tax team.

She focuses on estate planning for private clients in both the UK domestic and international arena. She is based in London after spending three years on secondment to Withers' offices in the US.

In her 23 years at Withers Penny's client base is primarily within three main areas: ‘non-doms' who are living in, or looking to relocate to, the UK; families living in the UK with US and UK issues who need help with their estate planning concerns; and international families who are looking for effective governance structures through which to organise the long term transition of wealth. In the latter context Penny's client base is mostly located in Latin America.

Penny is part of Withers' US/UK team in London and has developed US/UK estate planning models designed to demystify the complex arrangements that are required to avoid potential double taxation for families with US and UK connections.

Penny was one of just three Family and Private Client lawyers to be listed in The Lawyer's Hot 100 2015, a report which listed individuals working at the forefront of their practice areas.

Track record

Swiss family office

Advised a Swiss family office on the structuring of investments in UK commercial real estate - working within a multi-disciplinary team of colleagues with expertise in commercial real estate, corporate law and banking law to structure and document the funding arrangements to avoid triggering a taxable remittance to the UK by the principle.

Families and trustees

Advises families and trustees on the steps to take prior to the non-dom reforms, particularly in relation to trusts established by individuals who became deemed domiciled for all tax purposes on 6 April 2017.

Talks

- Withers webinar 'What's next: 2021 foresight for individuals with US-transatlantic ties' - December 16, 2020
- STEP Caribbean Conference - April 2016
- STEP Caribbean Conference - May 2015
- Lexis Nexis webinar 'Private Client Tax' - 15 September 2014
- Lexis Nexis Conference London 'Private Client Tax: Latin America' - November 2012
- STEP New York 'US Breakfast Briefing' Withers LLP - October 2012
- International Tax and Trust Congress (Barbados) - March 2012
- British American Business Council of New England (Boston, USA) - March 2012
- Lexis Nexis webinar 'Residence and Domicile Issues' - February 2012

External publications

Co-author of *The Guide to US/UK Private Wealth Tax Planning* (2nd edition), Bloomsbury, July 2016

Navigating the Treacherous Tax North Atlantic: Aspects of Anglo-American Estate Planning, Chapter 18, ABA's Updated Guide to International Estate Planning - November 2013, co-author

'Planning and Administration of Offshore and Onshore Trusts', Tolleys loose leaf publication, contributor

Admissions

England and Wales, 1990

Education

University of Liverpool, LL.B (Hons)

Languages

English

Memberships

The Society of Trust and Estate Practitioners (STEP)

Former member of Law Society's Tax Law Committee

Former Chair of the Law Society's Capital Taxes sub-committee

Key dates

Year joined: 1994

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