



KATHERINE BULLOCK

Katherine is expert tax counsel and advises on all areas of personal and corporate taxation, with a focus on high net worth individuals and their businesses. She specialises in land structuring and family succession. Her clients include individuals, charities, entrepreneurs, private businesses, landed estates, trustees and family investment companies as well as partnerships and companies of all sizes.

Examples of recent advice includes structuring for entrepreneur's relief, the hybrid entity rules, business property relief, incorporation of mixed property partnerships, restructuring offshore and onshore trust structures, the corporate interest restriction, main residence relief and termination payments.

Katherine's clients can expect to work with her as an integrated, approachable and responsive member of the team, working collaboratively to achieve the best outcomes for the end client.

CONTACT

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Experience & Career

Katherine returned to the bar in 2018, having previously been a senior tax partner with two Big 4 professional services firms for over 15 years, first as head of the UK Private Client Practice of PwC and then as the head of the Private Client Practice for Europe, Middle East, India and Asia and UK Family Business Leader at EY.

As a result, Katherine has extensive experience of the management and balancing of risk in today's reality of the GAAR, DOTAS, TAARs and the tax transparency agenda, both in terms of the management of litigation and direct client handling, as well as the commercial and reputational risk in providing complex tax advice from within a professional services environment.

Qualifications and Education

- MA(Hons) in Law from St John's College, Cambridge University
- Trust & Estate Practitioner (STEP)
- Chartered Tax Adviser
- Member of the Revenue Bar Association
- Certified Family Business Adviser
- Chartered Financial Planner (CFP and Chartered FCSI)

Recognition & Awards

- Top 50 Most Influential Private Client Practitioners 2013, 2014 & 2018
- Spears 500 (Top 50 Tax Advisors) 2018

Publications & Lecturing

Katherine writes and lectures extensively on all aspects of UK and international taxation. As past editor of the definitive practitioners' text on Land Taxation, Katherine is regularly called on by specialist associations, industry bodies and expert panels to share her expertise.

Testimonials

"The value that Katherine brings to our work together is a high degree of professionalism and the ability to explain complex problems and a range of solutions so that the non-professional can understand the problem and proposed solution. Her key strength is that she is able to refine solutions quickly and efficiently which of course any client is happy about both in terms of time and cost. Katherine very quickly becomes part of the team."

"I have to say that working with you has always been a true pleasure. You are professionally of course very sharp and talented. But more importantly, you are a person who is socially talented and absolutely trustworthy. A rare characteristic these days."

"Katherine is a first rate Private Client practitioner, having been Private Client leader in two Big 4 firms before joining the bar. Not only is her technical knowledge first rate, she has a wealth of practical experience and a strong sense of the red lines which makes her invaluable in resolving disputes. She is highly creative and develops compelling solutions, always pragmatic and commercial in her thinking."