

PRIVATE CLIENT





We understand the importance of long-term wealth preservation and enhancement for individuals, and we firmly believe that a tailor-made strategy and structure are essential for achieving this goal. Recognising that each individual has unique concerns, needs, and objectives, we take these factors into account to deliver the most suitable structure and approach.

We take pride in offering carefully crafted, effective bespoke solutions tailored to meet our clients' needs.

While Hong Kong does not impose estate duty, many residents have assets spread across various parts of the world. Consequently, a tax review is important for succession planning. At OLN, our robust **Tax Advisory** team comprises lawyers who are dually qualified in tax and accounting, enabling us to custom-tailor solutions that best meet our clients' needs.





SERVICES

- Administration and distribution of estates in Hong Kong and worldwide
- Advising on inheritance law in Hong Kong
- Applications for grants of probate and letters of administration
- Beddoe applications
- Cross-border asset management
- Establishing trusts in Hong Kong
- Estate planning, preparing (enduring) power of attorney, wills and codicils
- Handling trust, probate and administration disputes
- Preparing Deeds of Family Arrangement
- Acting in Mental Health Proceedings
- Providing trustee service and advising independent trustees and protectors
- Resealing foreign grants in Hong Kong



ESTATE PLANNING FOR AN INDEPENDENT TOMORROW

As our society evolves, our legal system may not advance as quickly and non traditional relationships may not be recognised under the law. Proper estate planning ensures we can provide for those we really care about.

Estate planning is not just a consideration for high-net-worth individuals with a large asset portfolio. It has relevance to everyone who wishes to organize testamentary affairs to save the loved one's hassles. Even for general workers in Hong Kong without owning any real estate properties, their Mandatory Provident Fund (MPF) contributions could have accumulated to a considerable amount, warranting planning in advance.

Estate planning is a means for the client to:

- Decide matters after death, and assign a competent person to execute the same
- Take care of those family members who have special needs
- Provide for those who cannot benefit from the client's legacy under law without the client's proper directives
- Maximise the benefit of the client's wealth for the client's loved ones, without compromising other entitlements

OLN aids a diverse range of clients in achieving these goals by evaluating their needs and issues, and offering practical legal solutions. Through collaboration with foreign attorneys, accountants, and professional trustees, OLN offers support to clients in managing assets on a global scale. We offer expert guidance on estate planning for individuals, couples, and expatriates in Hong Kong.

PROBATE AND ADMINISTRATION

The issues and legal matters involved following a loved one's death can be overwhelming. Our team at OLN can guide clients through the complexities in the probate and administration process, providing necessary assistance and recommendations in the procedures that will lighten clients' burden and allow the process to be as efficient and smooth as possible. From giving general initial advice to clients who are beneficiaries or acting as executors or administrators, to applying for grants on behalf of clients in their own right and administering an entire estate, we pride ourselves in guiding our clients every step of the way.

At OLN, we recognise the complexity and sensitivity in the probate and administration process. Our experienced lawyers work closely with individuals and families to understand their expectations and concerns, and address each case with discrete care and confidence to ensure a successful conclusion.

The size and international reach of OLN enables us to manage large and complex estates. Our lawyers are experienced in dealing with cross-border inheritance and have handled estates of all sizes, from small estates which may be administered summarily to large notable family legacies with generations of beneficiaries.

With team members specialising not only in probate and administration but also in estate planning, and corporate and tax matters, our clients can rest assured that their matters are handled in a holistic manner.

CONTENTIOUS PROBATE

There is no complete certainty to a smooth and problem-free probate or administration process. Much effort may have been put into the planning of an estate, but unexpected circumstances may still arise.

When disputes arise in relation to estates and trusts, clients can benefit from advice of our lawyers who are not only knowledgeable in the law of the relevant areas, but also understand the importance of family relationships and dynamics in contentious probate matters. Our **team of experienced litigators** are here to deliver practical legal advice tailored to our clients' needs and circumstances, and to make sure that their interests and futures are best protected.



TEAM MEMBERS



Gordon D. Oldham

Senior Partner

✉ goldham@oln-law.com



Anna W.K. Chan

Partner, Head of Private Client

✉ anna.chan@oln-law.com



Paul E. Firmin

Partner

✉ paulfirmin@oln-law.com



Jonathan Lam

Partner

✉ jonathan.lam@oln-law.com



Victor K.M. Ng

Partner, CPA

✉ victor.ng@oln-law.com



Gon J. Yeung

Partner

✉ gon.yeung@oln-law.com



Barbara P.Y. Kwong

Senior Associate

✉ barbara.kwong@oln-law.com



Gareth K.W. Leung

Associate

✉ gareth.leung@oln-law.com



Dexter H.F. Yuen

Associate

✉ dexter.yuen@oln-law.com



Ivy W.F. Hui

Associate

✉ ivy.hui@oln-law.com



ABOUT OLDHAM, LI & NIE (OLN)

OLN is a leading independent Hong Kong law firm, whose commitment to professional excellence has been the cornerstone of the firm since its creation in **1987**. With many years of experience practising in Hong Kong, our diverse global employees, who embody the firm's East-West culture, are able to deliver an integrated suite of legal and business solutions.

No. of lawyers: 40+

No. of staff: 100+

Lawyers admitted to practice in one or more jurisdictions: Hong Kong, the United Kingdom (England and Wales), several US states, Australia, Canada, France, Japan.

Practice Areas:

- Canadian Notarization Services in Hong Kong
- China Practice
- Chinese Notary Services (CAAO)
- Commercial Fraud and Asset Tracing
- Corporate and Commercial Law
- Dispute Resolution
- Elder Law Practice
- Employment and Business Immigration
- Family Law
- Financial Service and Regulatory
- French Practice
- Fund Practice
- Insolvency and Restructuring
- Insurance Law
- Intellectual Property Law
- Japanese Practice
- Notary
- Personal Injury
- **Private Client**
- Regulatory Compliance, Investigations and Enforcement
- Startups and Venture Capital
- Tax Advisory

HONG KONG

Suite 503, 5/F, St. George's Building
2 Ice House Street
Central
Hong Kong
Tel: +852 2868 0696
Fax: +852 2810 6796 · 2845 6671

SHANGHAI

Room 1114, 11th Floor
Far East International Plaza
Tower B 317, Xian Xia Road
Changning District
Shanghai, 200051
Tel: +86 21 6278 0612
Fax: +86 21 6278 0613

www.olin-law.com

