

Lisa Mark-Bell

Director & Joint Head of Oxford Trusts, Estates and Tax Team

"Lisa Mark Bell is very approachable and easy to work with. Practical, pragmatic and dedicated to finding solutions for her clients. She is friendly and efficient."

(The Legal 500, 2024)



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Lisa Mark-Bell is the joint head of the Oxford trusts, estates and tax team, and is dual qualified as a solicitor and a chartered tax advisor.

She acts for a wide range of clients in relation to their estate and trust planning, in particular for those with complex business, agricultural, intellectual property or international interests, with a view to managing the transition of wealth between generations in a tax efficient manner.

Lisa has also developed a speciality in providing bespoke trust advice to trustees, including Landed Estates. She is adept at designing practical solutions to complex tax and trust problems, assisting with trust settlement, management and modification and advising both individuals and trustees on tax mitigation strategies and the implementation of the same.

Lisa also acts in the administration of complex, high net worth estates. As a director of Freeths Trustees Limited, Freeths' trust corporation, Lisa acts through the company as both an executor and trustee.

As well as being a member of the Chartered Institute of Tax Advisors, she is also a member of the Society for Trusts and Estate Practitioners.

Lisa is listed as a Recommended Lawyer and recognised as a Next Generation Partner in The Legal 500 (2024 edition) in Personal Tax, Trusts and Probate.

Legal Services

Probate Application Solicitors

Selected Cases

- Advising individual clients on wealth preservation through estate, succession and tax planning.
- Administering high net worth estates, including those with agricultural and business property, and advising in relation to tax mitigation measures and reliefs available.

Tax

Selected Cases

- Advising charities in relation to complex tax issues. This includes calculating inheritance tax liabilities where there is an interaction of the grossing up and abatement rules, advising on Re Benham grossing requirements, negotiations with HM Revenue and Customs, and advising on the mitigation of capital gains tax.

Sectors