

Louise Lewis

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



'Louise Lewis, an outstanding, highly articulate and dedicated lawyer who is passionate about supporting her clients and providing solutions and value, is a thoughtful and a collaborative problem solver, generous with her time, and very approachable in her working style. Louise is a complete pleasure to work with and a stand-out lawyer working in a very strong partnership.'

(The Legal 500, 2024)

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Louise is a Partner and joint head of the Oxford Trusts, Estates and Tax Team. She is a highly regarded private client lawyer who advises on a variety of matters. Louise qualified in 2005 and joined our firm from Penningtons Manches Cooper in June 2019.

Louise drafts Wills, sets up and administers trusts, administers estates and drafts and registers powers of attorney. She has expertise in the field of mental capacity and advises on disabled persons' trusts, deputyships for children reaching adulthood and other welfare-related issues. She prepares lasting powers of attorney and Wills for clients with mental capacity issues and complex applications to the Court of Protection and High Court for mentally incapacitated people. These include applications for statutory Wills, for gifts and trusts, for removal of incapacitated trustees and for welfare decisions. Louise was the Deputy Chair of the steering committee for STEP's mental capacity special interest group between 2021-2023, and she Chaired a session on mental capacity and welfare issues at STEP's global congress in London in summer 2022. She regularly speaks on mental capacity topics and has presented for the Brain Injury Association and the Alzheimer's Society among others. Louise is a Dementia Friend. In 2020, she completed an advanced STEP certificate in advising vulnerable clients, receiving a distinction.

In addition, Louise is a member of the firm's [private wealth initiative](#) and is able to provide advice to business clients on estate planning at all stages of the business cycle. This includes tax advice and trusts for people

exiting their businesses, advice on Wills and the interaction of Wills with corporate structures, advice on suitable structures for start-up owners and new partnerships and advice on trusts to hold company shares. Louise also administers business interests following death of business owners and advises on available tax reliefs for estates.

Louise has considerable experience of working with international clients and advises on residence and domicile and cross border estate planning.

In June 2023, Louise completed an advanced STEP certificate in UK tax for international clients, receiving a distinction.

In October 2023, Louise was awarded with 'Lawyer of the Year' at the BBO Law Society awards 2023.

Louise Lewis is a Recommended Lawyer and a Next Generation Partner in The Legal 500 (2024 edition).

Legal Services

Probate Application Solicitors

Selected Cases

- Setting up lifetime and complementary trusts in a Will for a client to make provision for a second spouse and children from his first marriage. The inheritance tax saving as a result of this planning was approximately £70,000.
- Advising on a lifetime trust for parents with a mentally disabled child and assisting with financial planning. This included liaising with mental health professionals and financial advisers in order to ensure that the child's ongoing financial and practical needs were catered for.
- Advising a family on discussions with charities over the provisions of a deceased relative's Will and negotiating with the charities and the Attorney General to save a potentially failed charitable legacy.
- Writing a toolkit for lawyers covering all aspects of the law on digital estate planning, including privacy, intellectual property, data protection, contract law (ISPs terms of business) and licensing, as well as providing guidance on this field through the STEP digital assets special interest group.
- Working with a family whose disabled child had died young, securing a retrospective gratuitous care claim for the family in the order of £700,000 thereby saving the estate approximately £280,000 in inheritance tax.
- Raising funds for two Oxfordshire-based charities through legacy donations and preparing documents for those charities to facilitate donations. Other charitable work has included speaking at an event hosted by the Alzheimer's Society on the tax benefits of donating to charity and hosting a Wills clinic at an Oxfordshire based charity so that charity donors could receive advice on estate and tax planning

Sectors