



SANCTORAS



# We are Sanctoras

LONDON

DUBAI

A breath of fresh air  
in Private Client Services.

Tax Advisory and Family Office Services

At Sanctoras,  
we do things  
**differently.**





Working with

## Global Private Clients

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The complexity of a multi-jurisdictional lifestyle demands the most technical and specialist knowledge, combined with sound practical advice.

At Sanctoras we have an experienced team and a strong network of trusted specialist advisors around the world, to ensure we co-ordinate the best advice, even in the most complex cross-border situations. We are well-versed in matters relating to a number of jurisdictions, particularly those with favourable tax regimes for non-citizens.

Whether it's a family relocation to Portugal, a business expansion in Dubai or a tax return in New York, we can help.

Working with

## UK Private Clients and Entrepreneurs

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Against a backdrop of global change and uncertainty – now more than ever – individuals and business owners in the UK require robust technical advice covering the whole spectrum of their personal and business interests.

The Sanctoras team has vast experience across the range of personal taxes: from inheritance tax structuring and pre-business sale planning, to tax-efficient holding of investments and acquisition of residential and commercial property.

We understand that tax should not be the driving force behind your every decision. Which is why we work closely with you to understand the vision you have for your life, both privately and professionally, and support you in making it a reality.

# Specialist Advisory

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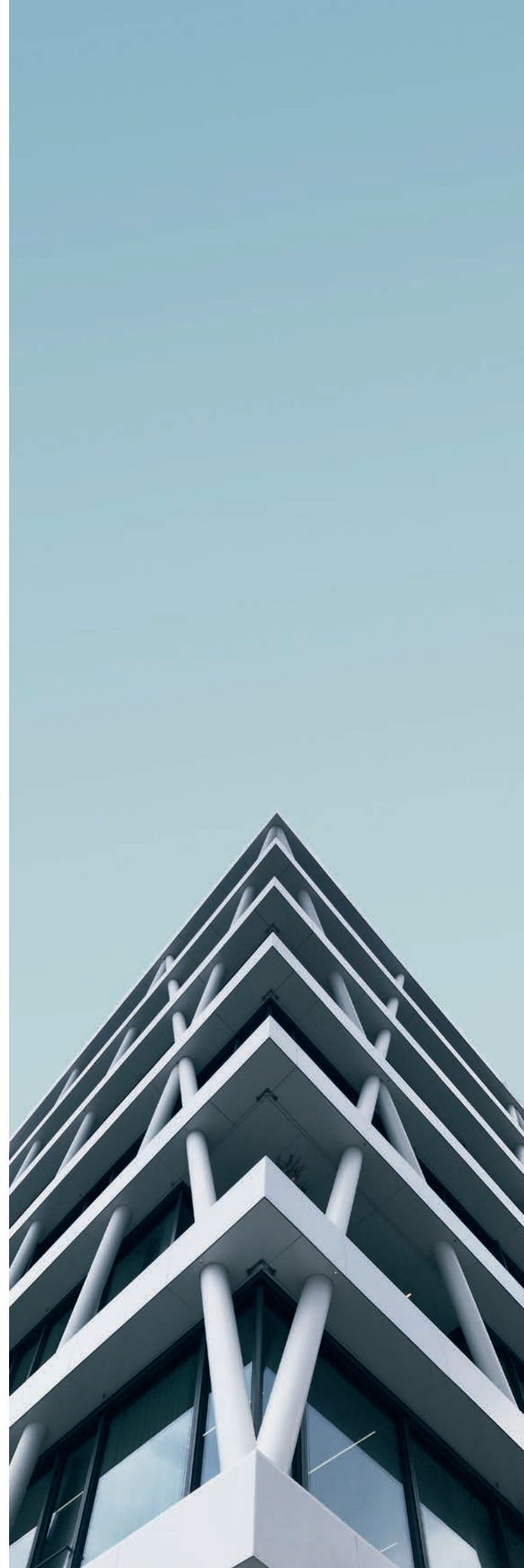
We are privileged to work for some of the most driven and dynamic people in the world, who need highly specialist advice on complex areas. At Sanctoras, we can help with everything from visas and immigration to philanthropic work and family governance.

We collaborate with family lawyers; regularly providing tax advice in divorce proceedings, either for one party or as a Single Joint Expert.

“James Heathcote is a rising star. He provides clear advice paired with a wider appreciation of the business need. He can grasp difficult matters extremely quickly, and has a calm and patient manner which clients very much appreciate.”

Claire Gordon  
Partner, Farrer & Co.

The Sanctoras team is highly experienced working with families in the Middle East, for whom dealing with succession planning in accordance with Shari’a law is paramount. Ensuring assets pass to beneficiaries in accordance with the family’s wishes requires careful consideration, and we are able to advise in a holistic, practical and sensitive way.



# Family Office Services

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What constitutes a Family Office means different things to different people; with the common theme being a team which helps ensure busy, complex lives run more smoothly.

A Family Office can mean a specific entity through which families organise their affairs collectively. It can also mean a team of specialists who support the family. Often it means both.

We can advise on what a Family Office might mean for you. We can also assist at every stage of its establishment and on-going management.

The Sanctoras team has particular expertise advising on the establishment and management of trusts, foundations and similar entities, either on a stand alone basis or as part of a wider Family Office structure.



# Why choose Sanctoras

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Put simply, our purpose is to make our clients' lives easier.

We developed our service to fit with your life; to easily become part of the engine room which helps you achieve your objectives.

Your time is precious and should be spent on the things that are most important to you. Whether the focus of your life is business, family or leisure, or a delicate balance of all three, we will support you.



“James is a highly competent tax adviser and lateral thinker who has the ability to convey complex solutions effectively and succinctly. We work collaboratively with James and the team at Sanctoras for clients with sophisticated financial planning and tax needs, and find their expertise and knowledge of huge benefit.”

Aled Phillips

Director and Chartered Financial Planner, Niche Private Clients

# About Sanctoras

Our name derives from words of significance to us as a business.

**'Sancus'** – the Roman God of truth and honesty, which are the foundations of our vision.

**'Sanctuary'** – represents the safe haven we create for our clients, and our aim to always better protect their interests.

The values that drive us:

## Trust, honesty & ethics

in all we do.

## Discretion & sanctuary

the privacy and security we provide all our clients.

## Expertise & innovation

applying our deep technical knowledge to think outside the box.

## Fairness

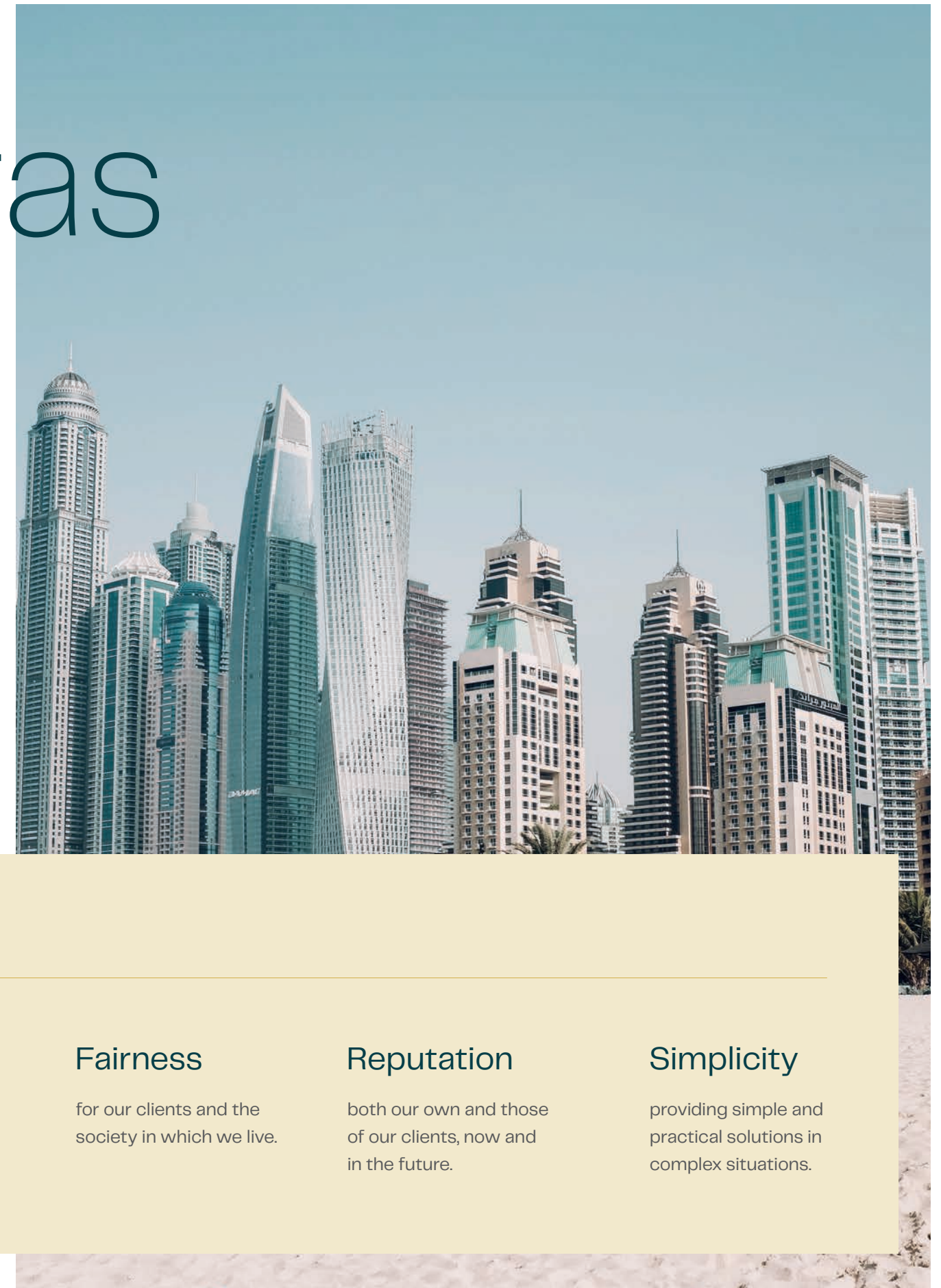
for our clients and the society in which we live.

## Reputation

both our own and those of our clients, now and in the future.

## Simplicity

providing simple and practical solutions in complex situations.





# Our Founder

James Heathcote, our Founder and CEO, works with high-net-worth individuals, families and trustees across the globe. He is the traveller of the team, meaning in his spare time he is most likely to be on a plane exploring somewhere!

James established Sanctoras to break away from traditional models of hourly billing and reactive working. Which means we are able to work proactively and collaboratively to ensure we – and therefore our clients – are always ahead of the curve.

“Our clients’ lives are all different. What works for one client may not quite suit another, so Sanctoras strives to ensure our approach and way of working reflects what matters to each individual.

Beyond that, my vision for Sanctoras is simple: exceptional service, technical excellence and integrity at all times.”

James advises on all aspects of UK personal tax, with a particular focus on international private clients and entrepreneurs. He is highly experienced in the tax and practical aspects of trusts, foundations and other structures, both in the UK and overseas.

A member of the Chartered Institute of Taxation and the Association of Tax Technicians, James holds a degree in Languages & Linguistics from the University of York. He has studied and worked in London, Leeds, Beijing, Shanghai and Dubai.

- Ranked as a ‘Top Recommended’ Tax and Trusts Advisor by Spear’s in 2020, 2021 and 2022
- Listed as an ‘Elite Recommended’ Advisor in the Private Client Global Elite Directory 2022-23
- Shortlisted as a ‘Future Leader in Private Client’ at the Spear’s Awards 2022
- Named ‘Advisor of the Year’ at the Yorkshire Accountancy Awards 2020
- Listed as an eprivateclient ‘Top 35 under 35’ Private Client Practitioner in 2017





# The Team

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Our team hails from a wide range of backgrounds, all sharing one thing in common – a desire to do things differently. To this end, we only bring people into Sanctoras who naturally live our values.

We are registered with the Chartered Institute of Taxation – the gold standard of taxation education in the UK – meaning we always work to the highest standards. Our team constantly strives to build our skills and knowledge, thus ensuring we deliver exceptional advice and exemplary service no matter how quickly the world changes.

Every Sanctoras client is assigned a dedicated point of contact, with responsibility for delivering an efficient, pragmatic and proactive service. Your dedicated contact is backed up by a close-knit team, meaning you will always be able to speak to someone within Sanctoras who understands the detail of your situation, even if your main contact is unavailable.

We place great value in the wellbeing of our team and want to make Sanctoras a happy, exciting and fulfilling place for people to thrive. This will ensure everyone is aligned with our aim to be known as the go-to firm for tax, structuring and family office advisory services for private clients in the UK and globally.

“The team at Sanctoras have been outstanding in providing me with commercial, practical and forward-thinking advice, enabling me to scale-up my business quickly and efficiently.”

Harry Skeggs  
Award-winning Wildlife Photographer

“International tax is a minefield of complexity, yet James and his team have mastered the art of identifying simple, practical solutions.”

David Richards  
Founder & CEO, WANdisco plc and the EyUp Academy





# Your global advisor

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From our bases in the UK and Dubai, we advise and support clients around the globe.

We can work wherever and however works for you, whether that's:

- virtually
- face-to-face
- via good old-fashioned phone call
- at your offices, an airport lounge or your favourite coffee shop!





# The Sanctoras Foundation

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As a responsible and future-aware business, we are driven to give back whenever we can, to help build a stronger future for us all.

We have established The Sanctoras Foundation, a UK-based charity, to enable us to formally pursue our own philanthropic work.

**We have made commitments to:**

- Donate 5% of our net profits each year to The Sanctoras Foundation
- Volunteer time to support important causes close to our hearts
- Provide our services pro bono to other charities
- Deliver talks to schools and colleges about careers in tax and professional services, particularly in areas with traditionally low uptake
- Establish mentorships to support the next generation of entrepreneurs and business people

**We are Sanctoras.**  
We do things differently.  
**Are we for you?**

We look forward to discussing how we can work with you to support you in achieving your aims.



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