

Trust Administration Support

We are committed to supporting advisers in developing their trust related business through providing both online and offline resources at every stage of the trust planning process. We offer specimen trust documents as well as access to in-house technical trust support from our Technical Services team.

Where enhanced support in relation to trust solutions is required, the following providers offer services such as trust administration, accounting, tax advice and compliance support.

We are not affiliated with the trust service providers listed below and do not receive a fee or commission for any referrals to them. The below summaries of services has been provided by each trust service provider. The contact details are provided for information purposes only and not intended to be a recommendation for any third-party service. Any links to websites (other than those owned by Transact) are provided for information purposes only. No responsibility is accepted for their content or their availability.

Blick Rothenberg

Blick Rothenberg advises on trusts of all sizes and offer a full range of compliance services including:



- Preparation of trust tax returns and electronic submission to HMRC (SA900).
- Preparation of trust accounts.
- Production of tax certificates (forms R185) for beneficiaries.
- Calculation of maximum income distributions.
- Preparation of inheritance tax accounts for ten-year anniversaries and exit charges.

In addition, they can advise on all tax issues including tax efficient winding up of trusts, securing reliefs from Capital Gains Tax and Inheritance Tax and using trusts in estate planning.

Stephanie Parker
020 7544 8863

stephanie.parker@blickrothenberg.com
www.blickrothenberg.com

Ludlow Trust Company

Ludlow Trust Company is an independent UK-based trust company managing over 5,000, across both family and charitable trusts, managing over £1.5 billion of assets. Ludlow acquired the UK Trust activities of Coutts, NatWest and RBS in April 2021, as well as the UK trust businesses of C Hoare & Co in April 2024 and HSBC in March 2025. The team provide all trust administration services with a client first focus. They hold investments with a range of investment managers, investment bonds, property, loans and a range of other assets and look to work with settlors, trustees and beneficiaries to ensure the optimum succession of wealth in accordance with the wishes of the family. They regularly act as either co-trustee or sole trustee, depending upon the preferences of the settlor and the family.



Ludlow also offer a trust registration service for trusts of which Ludlow is not a trustee, taking the burden away from clients and their advisors. In addition, via Charter Tax, part of the Ludlow Trust Group, accountancy and tax advice is also available to any trust as well as individual clients on their overall tax planning, whether UK or internationally focussed.

Ludlow Trust Company are able to act as a corporate executor under a will and Charter Tax provide probate services throughout an estate administration process.

They can also act as professional trustees for Transact's Flexible Reversionary Trust.

Chris Thurlow

020 4558 3554

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www.ludlowtrust.com

Mills & Reeve LLP

Mills & Reeve provide advice on trust administration and taxation, trust compliance, accounting and trustee's duties and offer a wealth of legal, accounting and taxation knowledge in this area. The firm's trust corporation can also act as an independent professional Trustee.

The logo for Mills & Reeve consists of the company name 'MILLS & REEVE' in a purple, serif font.

Claire Nash

0121 456 8415

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mills-reeve.com

Solidus

Solidus is a trust services company who work with financial planners throughout the UK to provide their clients with enhanced advice in relation to trust solutions.

The logo for Solidus features the company name 'Solidus' in a blue, serif font.

Guaranteed Client Trust Solutions

Sonya Gosling

0845 260 8750

sonya@siep.co.uk

www.siep.co.uk

WAY Trustees Limited

WAY Trustees Limited offer IHT planning solutions. These trusts range from the mainstream (e.g. DGT's, Loan Trust) to more sophisticated but long established and HMRC accepted, Flexible Reversionary and Normal Expenditure Trusts.

WAY also offer Corporate Trustee Services to carry out the fiduciary and administrative responsibilities of trustees including all HMRC reporting, accounting and returns.

These services are available for both WAY trusts and external trusts.

WAY can also act as professional trustees for Transact's Flexible Reversionary Trust.



Client Services

01202 890895

clientservices@waygroup.co.uk

www.waytrustees.co.uk

ZEDRA

ZEDRA is the largest independent trust company in the UK with a heritage of administering trusts, which can be traced back more than 100 years and over 3,400 trusts under management comprising £1.5 billion of assets. ZEDRA is authorised and regulated by the FCA and the firm's trust corporation provides a professional trustee service including taxation compliance, accounting, regulatory reporting and all trustee duties with a focus on client service.



ZEDRA also provides a trustee assistance service for individual trustees requiring support with any aspect of their trustee role including registering trusts under the Trust Registration Service.

Additional services include Will writing, Probate assistance and Estate administration, plus Power of Attorney drafting and administration.

ZEDRA can also act as professional trustees for Transact's Flexible Reversionary Trust.

Sue Wakefield

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This page is for use by advisers only. It is intended as general guidance only and should not be viewed as a recommendation to use or rely on any of the providers mentioned. The information contained is not advice, nor is it a substitute for advice.



M389 Version (2) JUNE 2026

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