

## Katie Graves

PARTNER | HONG KONG

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KATIE.GRAVES@WITHERSWORLDWIDE.COM



+852 3711 1636

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SECRETARY JUDY HO



JUDY.HO@WITHERSWORLDWIDE.COM



+852 3711 1637



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### Katie is a partner in the private client and tax team.

She moved from the London office to Hong Kong in 2010, and is currently the regional divisional leader for the APAC private client and tax team. Her practice involves tax, trust and estate planning for wealthy international families.

She has particular expertise in assisting clients with the establishment of private trust company structures and related fiduciary and governance issues. Katie has advised a number of families in relation to the creation and ongoing running of single family offices.

In addition Katie advises UK expatriates and Asian families with UK connections on their personal tax issues and trustees on a range of matters including the consequences of holding UK assets or having UK resident beneficiaries.

Katie is currently Chair of STEP's Hong Kong Branch, and is also named as a leading individual for private client/wealth management in Chambers HNW 2016-2024 and Legal 500 2023 and 2024, Citywealth's 2016-2018 IFC Powerwomen Top 200 list and Citywealth's 2018 to 2024 Leading Private Client Lawyers list. She is recognised by Chambers HNW as an expert in UK tax issues for non-resident clients in the region as well as Asian families with connections to the UK. She "really understands the fabric of the private client market in Hong Kong".

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## Single family office platform

Drafting legislation to establish a single family office platform for a middle eastern financial centre.

## Trust and estate planning

Trust and estate planning for a prominent Asian family in conjunction with family law advice in advance of a member of the family's marriage.

## Establishing private trust company for multi-generational Asian family

Advising seven members of an Asian family spanning 2 generations in relation to the setting up of a private trust company (PTC). The PTC acts as trustee of a master trust which will hold the family office, the family business and the family investment entity. The beneficiaries of the master trust are a series of 'feeder' trusts established for the benefit of the family members and a number of charitable entities. The family have also established a sophisticated governance structure including a family council and family constitution.

## Structures and ownership of family assets

Advising a Middle Eastern family in connection with the review of the various family structures and the ownership of family assets following the sudden death of the patriarch, including considering, in conjunction with Counsel, whether any transactions entered into by the patriarch were caught by the death sickness rules.

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## Talks

- *'Global Positioning Service (GPS) Webinar: Your guide to global mobility issues and considerations'*, Apr 2022
- *'Global mobility and investment into the UK'*, Dec 2020
- *'Investing in Europe'* - STEP Webinar, Nov 2020
- *'Recent Cases Affecting the Wealth Management Industry'* - STEP Webinar, Nov 2020
- *'The tax implications and planning opportunities of moving to the UK'* - HKACC Webinar, Oct 2020
- *'China, Hong Kong and Singapore: Succession and Estate Planning - An Overview'*, STEP London - Oct 2017, panellist
- *'Family offices in Mainland China, Hong Kong and the rest of Asia'*, STEP Asia Conference - Nov 2016
- *'UK tax update: Residential Property and Non dom rules'*, STEP seminar - Sept 2016
- *'UK tax changes to residential property'* - Apr 2016
- *'UK commercial real estate investment'*, Withers seminar - Jan 2016
- *'Wills with fine wine'*, Hong Kong Football Club seminar - Dec 2015
- *'Update re UK tax issues'* - Sept and Dec 2015

## External publications

*'Is it necessary to have a Chinese notarised will to deal with my assets in the mainland?'*, Dec 2021, co-author

'Moving mountains. What it means to create a life in a new country, by choice or by force,' , May 7,2021, co-author

'Cross-Border Wills And Their Increasing Importance', Wealthbriefing - November 2017, author

## Admissions

Hong Kong, 2017

British Virgin Islands, 2012

England and Wales, 1991

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## Education

University of Birmingham, LLB (Hons) Law

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## Languages

English

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## Memberships

Society of Trust and Estate Practitioners - Chair of the Hong Kong branch

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## Key dates

Year joined: 1997

Year became partner: 2003

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