



## Partner Matthew Sperry IDs Major Trust Dispute Trends in Coriats Q&A

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London partner Matthew Sperry identified trust dispute trends over the past year, provided tips to avoid disputes and discussed how he expects those trends to play out in 2023 in a question and answer for Coriats' "Global Trust Trends - Mini Series."

Among the trends, Matthew noted the emergence of the United States as a global trust jurisdiction that is particularly complicated to navigate for ultra-high-net-worth (UHNW) individuals. Matthew also explained that UHNW families are increasingly sophisticated with their wealth planning, including establishing family offices and private trust companies.

Matthew said that being based in London is important because while London is the global capital of international private wealth, much of that wealth touches the US in some way. "I frequently represent offshore fiduciaries and the families that they serve on a prophylactic basis, working to minimize US tax exposure while ensuring compliance with relevant US legal framework, all in a manner that is considerate of family goals such as maintaining privacy, preserving structural flexibility, and granting family control over investments," said Matthew, who also is licensed to practice in New York, Illinois and Florida. "When disputes involve the US ... I work closely with clients and their non-US advisors to formulate a US legal strategy and, where applicable, assist them in pursuing remedies in US courts and support them in respect of US law matters arising in non-US controversies, or otherwise."

On tips for families embroiled in trust disputes, Matthew said surrounding yourself with the best team is critical. "When designing a trust and wealth succession structure, these advisors should foster a dialogue among the family that leads to transparency and an ultimate structure that accounts for the family's needs in a manner that reduces the likelihood of disputes," Matthew said.

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## CONTACTS

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