



## Javier Estella Lana

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### Avantia Asesoramiento Fiscal y Legal S.L.

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## Ranked In

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### Spain

Wealth Management (Band 3 )

## Profile

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**Specialisation:** Managing Partner. Lawyer. Provides tax and legal advisory services to domestic and international private wealth clients. Work includes national and international tax advisory services to high net worth individuals, family groups, artists and sportspersons, family businesses, entrepreneurs and company directors. Tax and legal services provided include business and wealth restructuring processes, national and international succession planning, cross-border planning, family protocols, business ventures, acquisitions, disposals, IPOs, remuneration planning and assistance on Spanish tax audits. Has been Professor of Instituto de Empresa (Madrid) and other institutions. Leading speaker on numerous conferences and seminars.

**Professional Memberships :** Spanish Law Society, Instituto de Empresa, IESE PDG (General Management Program) and Harvard Law School Leadership in Law Firms alumni.

**Career :** Qualified in 1989. Initial member of the Private Client Team of PricewaterhouseCoopers. Partner in Charge of the High Net Worth Practice of Ernst & Young Abogados. Currently Managing Partner, Avantia Asesoramiento Fiscal y Legal.

**Publications :** Several articles in national newspapers on private wealth taxation matters. Co-author in specialist private wealth publications.



### 3 Avantia Asesoramiento Fiscal y Legal S.L.

Based in Madrid and Bilbao, this specialist wealth management boutique has been offering expert advice on inheritance and family businesses to some of the richest individuals in the country for more than 15 years. Total dedication to confidentiality is at the heart of the group's ethos, and this is one of the attributes which brings household names to the boutique for advice. Its independence from banks is also an advantage, meaning that conflicts of interest are less likely to arise. Competitors acknowledge the firm's "*incredible client list*" and its well-established reputation. Senior partner [Javier Estella Lana](#) is a prominent name in the field and a true wealth management specialist.

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**CHAMBERS**  
**EUROPE****Contacts**

**Managing Partner:**  
Javier Estella Lana  
**International Private Wealth Services:**  
Patricia García Mediero

**Managing Partner:** Javier Estella Lana**Senior Partners:** Patricia García Mediero, Gabriel Pérez de Cárdenas**Number of partners worldwide: 3****Number of professionals worldwide: 10****MEMBERS**

**THE FIRM:** Avantia Asesoramiento Fiscal y Legal is one of the leading independent Spanish firms in the provision of tax and legal services to national and international private wealth clients. Its management team has over 19 years of professional experience gathered in PricewaterhouseCoopers in the UK and Spain, initiating the Spanish Private Client Practice, and Ernst & Young Abogados, with Javier Estella Lana as Partner-in-Charge of the Spanish High Net Worth Private Client Practice and Patricia García Mediero as Partner-in-Charge of the provision of international private wealth services. The firm focuses on building professional relationships with its clients based on trust, confidentiality and sound business and technical methodology on the basis of a joint tax and legal approach. Its professionals have outstanding academic qualifications in Spain and abroad in the fields of taxation, legal counsel and business management (Instituto de Empresa, IESE management programme, UK ATII, Harvard Law School), as well as extensive experience as regular speakers at leading national and international private wealth events (STEP, IIR, International Wealth Advisors Forum), professors at prominent Spanish academic institutions and universities (Instituto de Empresa, Universidad de Deusto) and contributors in specialist publications both in Spain and abroad. Avantia Asesoramiento Fiscal y Legal has offices in Madrid and Bilbao.

**MAIN AREAS OF PRACTICE:**

**Tax Services, Private Wealth:** The firm provides domestic and international tax advisory and compliance services to its private wealth clients at all wealth tiers, from individuals and their corporate interests through to their underlying investments, covering all direct and indirect taxes involved, including income tax, inheritance tax, corporation tax, VAT and transfer taxes. The firm also addresses tax needs arising from specific events such as business and wealth restructuring processes, 'intervivos' or 'mortis causa' free transfers, acquisition and disposal of business interests and/or passive investments, IPOs, joint venture agreements or other business ventures, real estate transactions, remuneration planning and any other arrangements giving rise to complex tax issues. It also provides services relating to tax audits and investigations, court appeals, as well as those relating to the submission and obtention of Spanish tax rulings. Gabriel Pérez de Cárdenas (tel: +34 91 310 2215, email: [gabriel.perez@avantiafo.com](mailto:gabriel.perez@avantiafo.com)) is a senior partner of the Domestic Tax Practice and Javier Estella Lana (tel: +34 91 310 2214, email: [javier.estella@avantia-fo.com](mailto:javier.estella@avantia-fo.com)) is the leading partner of the Tax and Legal Practice.

**Legal Services, Private Wealth:** The firm focuses on the provision of legal services to its private wealth clients covering all specialist areas of the law usually involved, including business, commercial, contract, real estate, family and civil law, at all wealth tiers. The firm also provides specific advisory, implementation and recurring legal services, including company secretarial, family protocols, estate and gift planning, probate services, as well as any advisory and contractual services required in relation to business and wealth restructuring processes, acquisition and disposal of assets, business or passive interests, IPOs and other business ventures, real estate transactions, including conveyance work, and any other arrangement giving rise to complex legal needs. Javier Estella Lana (tel: +34 91 310 2214, email: javier.estella@avantia-fo.com) is the leading partner of the Tax and Legal Practice.

**INTERNATIONAL WORK:** Avantia Asesoramiento Fiscal y Legal has a unique offering of a full-time professional team involved in the provision of cross-border private wealth tax and legal services to clients with an international profile. The firm provides these services to both Spanish nationals and family groups with investments or transactions abroad, including tax and legal services required on disposals of shares and business interests to multinational corporations, and to foreign citizens investing into Spain, whether real estate or other investments. It has extensive experience in international transactions, planning, implementing and providing full assistance on transfers of residence, advising on cross-border estate and gift matters both from a tax and international civil law perspective, assisting settlors, trustees and beneficiaries of trusts on all Spanish tax and legal matters affecting their arrangements and advisory services on the use of international structures for tax planning purposes. As an independent professional firm with extensive experience in international private wealth matters, Avantia Asesoramiento Fiscal y Legal combines the ability to coordinate cross-border projects with sound technical expertise and an outstanding network of working relationships with pre-eminent private wealth tax and legal advisors in all leading jurisdictions. Patricia García Mediero (tel: +34 94 423 2156, email: patricia.garcia@avantia-fo.com) is the leading partner of the International Practice.

**LANGUAGES:** English, French and Spanish.

**CLIENTS:** It is the strict policy of the firm not to disclose the names of its clients. Its high net worth clients include high and ultra high net worth individuals, family groups, artists and sports persons, family businesses, entrepreneurs, company directors and board members, private banks, private asset managers, leading and specialist law firms, trustees and executors of complex estates.

#### **Areas of Practice**

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