

PRIVATE WEALTH LAW — SPAIN

Band 2

Avantia Asesoramiento Fiscal y Legal S.L.

From the HNW guide

Avantia Asesoramiento is a highly specialised tax boutique which provides wealth management services to a range of clients. The lawyers have experience in tax and estate planning and estate administration, including cross-border matters.

"When the team takes something on I know I no longer have to worry about anything," says one client. Another client explains: *"Once they take on an issue, I know that they are going to find the most appropriate solution for my interests and that their execution will be efficient, acting independently on those matters where they do not require my intervention. In the matters that I give them, I can completely trust them."*

Notable practitioners

According to one client, department head [Javier Estella Lana](#) *"particularly stands out for his personal involvement, experience, technical rigour, strategic vision, pragmatism in solutions, added value and professional competence."* He often advises family groups and artists. *"I completely trust him and his judgement,"* says one source.

"We love to work with [Patricia García Mediero](#) on everything we do with private clients in Spain," confides one source. Another explains: *"She's really creative. She really tries to solve the issue and she never says no - I like that. She also has knowledge of other things, she knows what's going on in Portugal and she's up-to-date on the legislation. She's a very good lawyer."* Speaking about her area of expertise, one client states: *"I've worked with her and I think that she's a very good tax adviser."*

HNW Guide

AVANTIA ASESORAMIENTO FISCAL Y LEGAL S.L.

Madrid



Torres de Colón
Plaza de Colón 2 – 13º
Madrid
Madrid
Spain
28046

Tel: +34 91 310 2217
Fax: +34 91 308 2411
Email: [Contact Us](#)
Web: [Visit website](#)

Ranked Offices



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Firm profile submitted by Avantia Asesoramiento Fiscal y Legal S.L.

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 25 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.

Its professionals have outstanding academic qualifications in Spain and abroad in the fields of taxation, legal counsel and business management (Instituto de Empresa, IESE PDG, UK Institute of Taxation, 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, ABA), are professors at prominent Spanish academic institutions and universities (Instituto de Empresa, Universidad de Deusto), have acted as independent experts on succession matters at the Committee of Legal Affairs of the European Parliament - JURI and are regular contributors to specialist publications both in Spain and abroad. Avantia Asesoramiento Fiscal y Legal is widely reputed for its consistent quality and expertise and has been ranked as leader in its field by the most prestigious independent publications and bodies, including Chambers Europe, Legal Media Group – Euromoney, Citywealth Magazine, Who's Who Legal. It has been shortlisted by the Society of Trusts and Estate Practitioners (STEP) for its International Legal Team of the Year Award, and has won the 2015 Boutique Firm of the Year STEP award.

Domestic Tax & Legal Services, Private Wealth:

The firm provides tax and legal advisory and compliance services to its private wealth clients at all wealth tiers, including succession and will planning, tax audits and investigations, court appeals, as well as those relating to the submission and obtention of Spanish tax rulings and voluntary disclosure processes.

Contact: Javier Estella Lana (Leading Partner of the Tax and Legal Practice)

Tel: +34 91 310 2214 **Email:** javier.estella@avantia-fo.com

Contact: Patricia García Mediero (Leading Partner of the International Private Wealth Practice)

Tel: +34 94 423 2156 **Email:** patricia.garcia@avantia-fo.com

Contact: Gabriel Pérez de Cárdenas, Senior Partner **Tel:** +34 91 310 2215

Email: gabriel.perez@avantia-fo.com

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 international private wealth clients, whether Spanish nationals and family groups with investments or transactions abroad or foreign citizens investing or residing in Spain

Branches

Torres de Colón,
Plaza de Colón 2 – 13º,
Madrid,
Spain
28046
Tel +34 91 310 2217
Fax +34 91 308 2411
Email : avantia@avantia-fo.com

Website :

www.avantiaasesoramientofiscalylegal.com

Rodriguez Arias, 6 – 6º,
Dpto. 611,
Vizcaya,
Bilbao,
Basque Country
Spain
48008
Tel +34 94 423 2156
Fax +34 94 423 1126

CHAMBERS
AND PARTNERS



PATRICIA GARCÍA
MEDIERO

HNW Guide - also see Chambers Europe

PATRICIA GARCÍA MEDIERO

**Avantia Asesoramiento Fiscal y
Legal S.L. - Bilbao**

Rodriguez Arias, 6 – 6º
Bilbao, Basque Country,
Spain
48008

Tel: +34 94 423 2156

Fax: +34 94 423 1126

Email:

patricia.garcia@avantia-fo.com



Chambers Commentary (HNW)

Spain, Private Wealth Law

Band 3

*"We love to work with **Patricia García Mediero** on everything we do with private clients in Spain," confides one source. Another explains: "She's really creative. She really tries to solve the issue and she never says no - I like that. She also has knowledge of other things, she knows what's going on in Portugal and she's up-to-date on the legislation. She's a very good lawyer." Speaking about her area of expertise, one client states: "I've worked with her and I think that she's a very good tax adviser."*

Practice Areas

Leading Partner, International Private Wealth practice. Provides advisory and compliance services to Spanish citizens investing or moving abroad, non-Spanish citizens investing or taking up residence in Spain, advice and probate services to cross-border estates, structuring advice and conveyance work on Spanish situs real estate, tax and legal advice on marriage, parental custody, succession planning, testamentary arrangements and other civil law matters, advice on Spanish implications of trusts and foundation arrangements, assistance on tax audits as well as civil and criminal tax cases before Spanish courts, voluntary disclosure procedures and private arbitration and dispute resolution both domestic and cross-border. Transactional advice on international M&A projects involving family-owned companies. Clients include individuals and families, executors, trustees, company directors, family offices, private banks and legal firms in need of Spanish tax and legal advice for international Private Wealth clients.

Professional Memberships

UK Institute of Taxation, (ATII 1992), Instituto de Empresa, ITPA

Career

Qualified in 1990. UK tax practitioner at Price Waterhouse (PwC) London. International Spanish tax practitioner at PwC Madrid and Bilbao. Partner of the International Private Client Practice at Ernst & Young Abogados. Currently Leading Partner of the International Private Wealth practice, Avantia Asesoramiento Fiscal y Legal.

Publications

Contributor to specialist publications, including Private Client Business. Regular speaker at conferences on specialist cross-border private client and estate matters organised by STEP, IBC and ABA. Active participant at the leading International Private Wealth Forums. Member of the experts' panel to the EU Legal Affairs Committee (JURI) on cross-border issues. Top rankings in the most prestigious specialist publications (including Chambers Europe, Chambers HNW, Legal Media group- Euromoney, Citywealth and Who'sWhoLegal. Finalists of the International Legal Team of the Year STEP Private Client Award. Winners of the STEP Boutique Firm of the Year 2015 Private Client Award. Judge of the STEP 2016 Private Client Awards.

HNW Guide - also see Chambers Europe

JAVIER ESTELLA LANA

Avantia Asesoramiento Fiscal y Legal S.L. - Madrid

Torres de Colón
Madrid, Madrid, Spain
28046

Tel: +34 91 310 2217
Fax: +34 91 308 2411
Email:
javier.estella@avantia-fo.com



Chambers Commentary (HNW)

Spain, Private Wealth Law Band 2

According to one client, department head **Javier Estella Lana** *"particularly stands out for his personal involvement, experience, technical rigour, strategic vision, pragmatism in solutions, added value and professional competence."* He often advises family groups and artists. *"I completely trust him and his judgement,"* says one source.

Practice Areas

Managing Partner. Lawyer. Provides tax, legal and strategic 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, testamentary execution and dispute resolution, cross-border planning, family protocols, business ventures, acquisitions, disposals, IPOs, remuneration planning and assistance on Spanish tax audits and voluntary disclosure procedures, as well as tax cases before Spanish civil and criminal courts.

Professional Memberships

Spanish Law Society, Instituto de Empresa, IESE PDG (General Management Program) and Harvard Law School Leadership in Law Firms alumni. Member and senior consultant to FIDE.

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. Has been Professor of Instituto de Empresa (Madrid) and other institutions. Leading speaker on numerous conferences and seminars. Top rankings in the most prestigious specialist publications (including Chambers Europe, Chambers HNW, Legal Media group-Euromoney). Finalists of the International Legal Team of the Year STEP Private Client Award. Winners of the STEP Boutique Firm of the Year 2015 Private Client Award.