

## PRIVATE WEALTH LAW — SPAIN

### Band 2

## Avantia Asesoramiento Fiscal y Legal S.L.

### From the HNW guide

The lawyers at this boutique tax law firm are *"precise, very diligent, and they transmit confidence in their work and in their advice,"* says one interviewee; *"I feel comfortable working with them."* This source continues: *"I've never had a problem, which is what you want. I really rely on their advice. Everything they've advised on has been correct; I've never had a situation that hasn't been supported by what their advice has been."*

The firm's client base includes business owners and executives, and many clients have international interests. One client praises the team's understanding of *"the big picture and the strategic vision,"* while another says that *"they act as a very reliable and articulate interface, helping non-Spanish people to understand the Spanish market and all its unique attributes. They provide a seamless service, so you can come to them with any issue, and they also offer a very personal service. They really are trusted advisers."*

### Notable practitioners

Clients consider [Javier Estella Lana](#) to be *"one of the best, most senior lawyers in Spain working in private wealth."* One client enthuses: *"Javier is extremely professional, trustworthy, efficient, intelligent, preserves confidentiality, and he has a very strong business mind. He is a great problem solver. He always tells me what can be done and what he advises against doing, in a very clear and direct way. When I speak with Javier on an issue, I know that he will solve it and that it is no longer my problem, and I stop worrying about it. He is the only lawyer I know that is able to do this."*

[Patricia García Mediero](#) *"works with some very complex international tax matters,"* sources say, and is *"very good technically, especially on international tax."* One client says García is *"particularly good at explaining Spain to non-Spanish people, being a trusted adviser and giving seamless advice."* Another client explains: *"I think the key for Patricia is she has the knowledge, she speaks very good English – she worked in England – she's intelligent, she understands how the English system works and how the Spanish system works, and that was critical."*

# Avantia Asesoramiento Fiscal y Legal S.L.

Firm Profile  
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Ranked Offices



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

**Managing Partner:** Javier Estella Lana

**Senior Partners:** Patricia García Mediero, Gabriel Pérez de Cárdenas

**Number of partners worldwide:** 3

**Number of professionals worldwide:** 15

**Languages:** English, French, Spanish

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 26 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), judges and members of the panel of experts to the STEP awards, 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.

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**Contact:** Gabriel Pérez de Cárdenas, Senior Partner

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#### **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**

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# PATRICIA GARCÍA MEDIERO

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## This Individual's Commentary in Chambers HNW 2017

### Spain, Private Wealth Law Band 3

**Patricia García Mediero** "works with some very complex international tax matters," sources say, and is "very good technically, especially on international tax." One client says García is "particularly good at explaining Spain to non-Spanish people, being a trusted adviser and giving seamless advice." Another client explains: "I think the key for Patricia is she has the knowledge, she speaks very good English – she worked in England – she's intelligent, she understands how the English system works and how the Spanish system works, and that was critical."

## Profile submitted by Patricia García Mediero

### Practice Areas

Leading partner, international private wealth practice. Provides advisory and compliance services to Spanish citizens investing or moving to Spain, advice and probate services to cross-border estates, structuring advice and conveyance work on Spanish real estate, advice on Spanish tax and legal implications on trusts and foundations, representation and advice on Spanish tax audits and civil and criminal tax cases before Spanish courts, advice and representation on CRS, exchange of information and voluntary disclosure procedures. Transactional advice on international M&A projects involving family-owned companies. Clients include individuals and families, executors, trustees, family offices, private banks and legal firms in need of Spanish tax and legal advice regarding international private wealth clients.

### Professional Memberships

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

### Career

Qualified in 1990. UK tax practitioner at PwC London. International Spanish tax practitioner at PwC Spain. Partner, international private client practice, EY Spain. Currently leading senior 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 cross-border estate matters, including STEP and ABA. Has been a Law School professor at Deusto University. Top rankings in specialist publications (*Chambers Europe*, *Chambers HNW*, *Legal Media group*, *Citywealth*, *Who'sWhoLegal*). Judge and member of panel of experts, STEP PCA awards. Member of Steering Committee, International Wealth Advisors forum. Member of experts' panel to the EU Legal Affairs Committee (JURI) on cross-border succession matters.

## JAVIER ESTELLA LANA

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### This Individual's Commentary in Chambers HNW 2017

#### Spain, Private Wealth Law Band 2

Clients consider **Javier Estella Lana** to be "one of the best, most senior lawyers in Spain working in private wealth." One client enthuses: "Javier is extremely professional, trustworthy, efficient, intelligent, preserves confidentiality, and he has a very strong business mind. He is a great problem solver. He always tells me what can be done and what he advises against doing, in a very clear and direct way. When I speak with Javier on an issue, I know that he will solve it and that it is no longer my problem, and I stop worrying about it. He is the only lawyer I know that is able to do this."

## Profile submitted by Javier Estella Lana

### 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 sportspeople, 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, CRS, exchange of information 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 PwC. Partner in Charge of the high net worth practice of EY Spain. 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'.