

PRIVATE WEALTH LAW — SPAIN

Band 2

Avantia Asesoramiento Fiscal y Legal S.L.

From the HNW guide

This boutique firm advises domestic and international private clients on a range of wealth management and tax matters. Peers comment on their focus and reputation in the market, with one saying: *"They are a boutique focused on wealth management. They are very good and very focused on this type of advice. They are technically very good, have been very successful and are very well positioned in the market."*

The team handles succession and wealth structures, estate and probate matters and inheritance tax planning. A client comments: *"I really trust them, they work very well and are highly professional. It is a reliable firm. I feel really comfortable. They are really specialists in family matters and restructuring, and have very good relationships with clients. You feel like they are by your side. They are really professional and it is really practical and easy to work with them."* Another client says: *"They are very reliable, give very sound advice, and are very open to assist at any time. They are very professional and thorough, and very good on complex tax matters and family businesses."*

Notable practitioners

Head of wealth management [Javier Estella Lana](#) *"has been a private client adviser for many years,"* reports one of his peers, adding: *"He is very well-known. He is technically very good and pays attention to details and his clients love him."* Another highlights his position in the market, saying: *"He is focused on the wealth management sector and is one of the main players. He has very good clients and is completely focused in this area."*

[Patricia García Mediero](#) advises individuals and family businesses on domestic and cross-border tax and private wealth matters. One market insider reports on a *"good experience working with her"* and praises her technical skills, particularly on international matters and negotiations.

HNW Guide Firm Profile

Avantia Asesoramiento Fiscal y Legal S.L.

Firm Profile
Madrid



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Ranked Offices



[Overview](#) [Practice areas](#) [Offices](#)

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

Senior Partners: Patricia García Mediero, Gabriel Pérez de Cárdenas

Number of partners worldwide: 3

Number of professionals worldwide: 15

Languages: *English, French, Spanish*

Firm Overview:

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 27 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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This Individual's Commentary in Chambers HNW 2018

Spain, Private Wealth Law
Band 3

Patricia García Mediero advises individuals and family businesses on domestic and cross-border tax and private wealth matters. One market insider reports on a *"good experience working with her"* and praises her technical skills, particularly on international matters and negotiations.

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 (ATI), (1992), Instituto de Empresa, Harvard Law School Leadership in Law Firms alumni. Steering Committee member of the STEP Cross-Border Estates SIG.

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, Private Client Global Elite). 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 2018

Spain, Private Wealth Law

Band 2

Head of wealth management **Javier Estella Lana** "has been a private client adviser for many years," reports one of his peers, adding: "He is very well-known. He is technically very good and pays attention to details and his clients love him."

Another highlights his position in the market, saying: "He is focused on the wealth management sector and is one of the main players. He has very good clients and is completely focused in this area."

Overview

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. STEP Member. 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'.