



# Sofia Thomas

## Chartered Tax Adviser

Sofia is one of the UK's leading experts in tax on divorce and family breakdown. She is the co author of *Tax Implications on Family Breakdown*, published with Bloomsbury and is a trusted partner to many top Family Law firms across England and Wales.

### CONTACT

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Sofia is a trusted single joint expert for a number of Top 500 Family Law Firms. She understands the critical role an SJE report can play in court and prepares clear, concise evidence that can be acted upon.

Sofia worked within the financial services industry for over 10 years. She began her career in tax at PricewaterhouseCoopers and from there she consulted at Google and went onto join Citibank before setting up Sofia Thomas Ltd. She is a member of the Chartered Institute of Taxation and the Association of Tax Technicians and sits on several technical committees. Sofia founded Sofia Thomas Ltd to assist family law professionals and their clients with the tax implications on family breakdown and separation. Sofia's unique understanding of the intersection of tax and family law has made her a trusted partner to Top 500 Law Firms across the UK.

### AS FEATURED

 TAXATION



Bloomsbury Professional   
Family Law



Chartered  
Tax Advisers



### ACCREDITATIONS

- > Member, Chartered Institute of Taxation
- > Member, Association of Tax Technicians
- > Associate Member, Resolution

### PUBLICATIONS

#### Books

- > *Tax Implications of Family Breakdown*, Bloomsbury Family Law, co-author
- > *Tax Planning 2019/20 Separation and Divorce Chapter*, Bloomsbury, co-author
- > *Tax Planning 2020/21 Separation and Divorce Chapter*, Bloomsbury, co-author

#### Articles

- > Regular contributor to Resolution, Taxation and Tax Advisor magazine. Some recent publications include:
  - *A Call for Kindness*, Tax Adviser Magazine, Jan 2021
  - *The true cost of a gift*, Tax Adviser Magazine, Nov 2020
  - *Tax changes for divorcing couples*, Resolution, May/June 2020
  - *Exploring the tax treatment of the main home on divorce*, Institute of Chartered Accountants in England and Wales, Jan 2020

### TECHNICAL COMMITTEES

- > HMRC Wealthy External Forum, ATT representative, Committee Member Dec 2020 to present
- > We can work it out Pod, Collaborative Family Law working Group, Resolution Committee Member Nov 2020 to present
- > Tax Panel, Government Consultations Advisory Group, Association of Accounting Technicians Committee Member June 2020 to present
- > Tax Technical Steering Group, Government Consultations Advisory Group, Association of Tax Technicians, Committee Member Aug 2019 to present

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## KEY EXPERTISE

Tax & Matrimonial Breakdown

Tax in Schedule 1 Proceedings

Family Home Tax Planning

Capital gains tax on divorce

Residence & Domicile

Land taxes in family breakdown

Tax planning on second marriages

Sale, Succession & Re-org of

Family Companies

## REFERENCES & CASE STUDIES

Available on request

## SINGLE JOINT EXPERT

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Sofia has vast experience in writing SJE reports analysing the tax impact of separation. Sofia understands the need for clear, concise actionable reports that all parties can understand.

Previous SJE reports have covered:

- > Investment/Rollover relief on transfer/sale of investment properties (200+ properties)
- > Capital gains tax on the marital home
- > Tax implications of Mesher order and deferred charge
- > Capital gains tax and land taxes on investment properties

## EXPERT INSTRUCTIONS

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Sofia has had huge success in negotiating with HMRC on behalf of clients, to reduce penalties or settle investigations.

Previous Expert Instructions include:

- > Review of pension sharing report, lifetime allowance breach
- > Tax implications of offshore income and assets
- > Analysis of complex earning structures
- > Availability and preservation of Entrepreneur's Relief
- > Transfer of assets in Schedule 1 separation
- > Analysis on validity of prior tax planning arrangements
- > UK implications of US trusts

## SHADOW EXPERT INSTRUCTIONS

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Sofia is trusted by many law firms to assist them in understanding an existing SJE report or cultivating the best questions to ask an SJE to produce a clear informative report.

## CLIENT TESTIMONIALS

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"Working with Sofia Thomas is a delight. We were given clear, concise, insightful advice from the outset. Sofia's response rate is excellent and nothing feels like too much trouble. I would definitely recommend Sofia to anyone with a matrimonial tax issue"

**Kathryn Ainsworth, Machins**

"Sofia was extremely efficient, personable and most importantly incredibly knowledgeable and professional "

**Ann Thompson, Goodman Ray**

"Sofia's attention to detail and ability to present information in an accessible way is second to none. She is approachable and professional. The clients I have recommended to her have said that she is nothing short of exceptional. Always top of my referral list when someone is in need of tax advice."

**Kara Swift, Family Law in Partnership**