

## SIMON TAUBE QC

"Absolutely regarded as a star of the Bar, he is a most impressive senior practitioner whom you feel very comfortable with."  
(Chambers UK 2019)



Call 1980 • QC 2000

Simon Taube QC's practice covers the broad range of Chancery activities in both litigation and advisory work. He also conducts cases abroad in other common law jurisdictions.

He is regarded as "*the brightest of his generation*" and a "*Star Individual*" in Chambers UK.

His special expertise includes the fields of UK and foreign trusts and estates, capital tax planning and trust taxation, and fiduciary duties generally. He also has wide experience in charity, property, securities, partnership, professional negligence and family provision matters.

Ranked in Tier 1 (Leading Silks) in Charities and Private Client: Trusts & Probate and in Tier 2 (Leading Silks) in Offshore in Legal 500 2021.

Ranked as a Star Individual for Chancery: Traditional for Chambers UK HNW 2020.

### Charities

Simon Taube is experienced in all aspects of Charity Law both litigious and administrative relating to charitable companies and trusts. He is regarded as "absolutely first class and one of the very big names at the Chancery Bar." Legal 500 2016 (Charities).

### Reported Cases:

- Re Nina Wang [2015] HKCFA: Charitable trust and company law.
- Re Warburg Institute – London University v Prag [2014]: Construction of Warburg Institute's Trust Deed.
- A-G's Poverty Reference [2011]: Meaning of public benefit in charity law.

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## Private Client: Contentious

A specialist onshore and offshore chancery litigation expert. Simon Taube appears in the courts in England, Bahamas, Bermuda, Cayman and Hong Kong and frequently advises in relation to other jurisdictions including Jersey and Guernsey.

“He has a superlative command of the law, is an incredibly clear communicator, and has an infallible sense of the right way to argue a case. An excellent advocate and adviser.” Chambers HNW 2016

“He’s top of the tree. He is very good at strategic masterminding. If you want an opinion that’s likely to squash your opponent and stop something in its tracks, Simon Taube is go-to.” Chambers UK 2017 (Chancery)

### Reported Cases:

- **(1) Investec Trust (Guernsey) Ltd (2) Bayeux Trustees Ltd (Respondents) v (1) Glenalla Properties Ltd (2) Thorson Investments Ltd (3) Eliza Ltd (4) Oscatello Investment Ltd (5) Rawlinson & Hunter Trustees SA (Appellants) (Guernsey) [2018] UKPC 7:** successfully acted for Investec Trust (Guernsey) Limited, a trustee subsidiary of the Investec banking and asset management company, in its eight-year case against the current trustees of the Tchenguiz Discretionary Trust and the liquidators of Investec Trust’s former subsidiary BVI Companies.
- **Dawson-Damer v Taylor Wessing [2017] EWCA Civ 74, [2015] EWHC 2366:** Data Protection Act and trusts.
- **Davidson v Seelig [2016]:** Protector’s powers and court’s trust jurisdiction.
- **Crociani v Crociani [2014] PC:** Trusts jurisdiction clauses.
- **Buzzoni v HMRC [2014] 1 WLR 3040 (CA):** IHT – Gift with Reservation of Benefit.
- **Labrousse v Frey [2012] CA, [2016]:** Abuse of process, breach of trust.
- **Fattal v Walbrook [2010]:** Trustee exoneration clause.
- **Helmsman v BNY [2009] Cayman:** Trust jurisdiction clauses.
- **AB v Barclays Private Bank [2006] Cayman:** No contest clause.
- **Sieff v Fox [2005]:** Trustees’ mistake.
- **Ingram v IRC [2000] HL:** IHT and leases.
- **X v A [2000]:** Trustees’ rights of indemnity.
- **Public Trustee v Cooper [1999]:** Court’s trust jurisdiction, conflicts of interest.
- **IRC v Berrill:** Income tax.
- **Re: Trafford:** CTT.
- **Sinclair v Lee:** ICI demerger.
- **Keene v Martin:** Company law – rectification of register.

## Private Client: Non-Contentious

Simon Taube advises on a wide range of issues including private wealth planning, tax and the drafting of trust documentation. “He’s phenomenally bright, has impeccable judgement, and his advice is always concise and clear.” Chambers UK 2015.

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## Reported Cases:

- **Law Society [2015]:** Advising on Law Society's guidance to solicitors concerning contentious probate matters.
- **In the Matter of the A Trust [2012] Bermuda:** Trust jurisdiction clauses.

## Capital Taxes

Simon undertakes capital taxes matters within the UK and in offshore jurisdictions.

## Recommendations

*"Absolutely outstanding."*

*"He's such an indisputable authority that standing against him is basically impossible. Just having him there is so valuable."*

*"The most affable man on the planet, he is really, really charming."*

*"He's just incredibly experienced and phenomenally bright."*

Chancery: Traditional - Chambers UK 2021

*"A real polymath and a man with a tremendous intellect, who homes in on the detail in a case."*

*"A strong advocate in court."*

Charities - Chambers UK 2021

*"He is an extremely thoughtful and intellectual practitioner. He is very detail-oriented and is always extremely well prepared."*

*"Technically outstanding."*

Offshore - Chambers UK 2021

*"Technically brilliant and a lawyer with a fine mind, he is a thoughtful silk whose written opinions are excellent. He understands clients and is very practical in his approach."*

Trusts - Chambers UK 2021

*'Is very experienced and incisive and looks ahead as to what is likely to happen later in a case.'*

*'Is helpful, authoritative, logical, measured and commercial. He is attentive with clients and solicitors and directional (as opposed to abstract) in his advice.'*

*'He has a calm and measured demeanour, coupled with technically brilliant advocacy.'*

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The *“absolutely outstanding”* Simon Taube QC has a commanding presence in the traditional chancery space, and is especially well known for handling heavyweight trusts cases.

*“He’s such an indisputable authority that standing against him is basically impossible. Just having him there is so valuable,”* says one interviewee, who also describes him as *“the most affable man on the planet and really, really charming.”*

Another source says: *“He’s just incredibly experienced and phenomenally bright.”*

Chambers HNW 2020

“Clearly one of the leading silks when it comes to charity law, he is able to digest the brief very quickly and has an instinctive sense of how to pitch the advice.”

“A brilliant advocate, he has a major talent for seeing the wood from the trees and a manner that clients warm to.”

“He has a huge forensic ability to dissect complex matters of trust law and discern a pattern that is not always immediately obvious to the rest of us. He pilots you through a complex maze of trust issues – where you get yourself into a technical knot, he will untie it.”

“Very thoughtful and very good at working alongside others. He has a good sense of tactics and strategy.”

“A brilliant advocate. He has a fantastic manner and a very incisive brain. He was brilliant. I really had the sense that the judge listened carefully to everything he said.”

“He is my go-to when I need a silk on the trusts side – he’s immensely bright, experienced and excellent at dealing with clients.”

Chambers UK 2020

“Very much a go-to counsel for serious trust law issues where the court is being asked to consider novel points or enters uncharted territory”

“A supremely clever silk”

“An immensely bright and vastly experienced silk”

Legal 500 2020

“Sheer knowledge of technical trust law, and his amazing ability to explain it”

“He has the ear of the court.”

“He has a huge forensic ability to dissect complex matters of trust law and discern a pattern that is not always immediately obvious to the rest of us. He pilots you through a complex maze of trust issues – where you get yourself into a technical knot, he will untie it. One of the leaders of the chancery Bar, he is utterly tenacious, and really goes to the end of the world to resolve the issues.”

HNW 2019

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“Fantastic”

“Elder statesman of this world”

WWL UK Bar 2019

“Absolutely regarded as a star of the Bar, he is a most impressive senior practitioner whom you feel very comfortable with.”

“His mastery of paperwork is unrivalled. and he has a great track record at the Bar.”

Chambers UK 2019

“Insightful and incisive. Superbly tactical.”

Legal 500 2018

“Thoughtful and diplomatic with clients, but always willing to give his advice.”

Legal 500 2018

“He is able to explain highly technical issues in a comprehensive and logical manner.”

Legal 500 2018

“An extremely skilled wordsmith, who can get to the core of an issue and analyse it correctly within minutes, even when others have spent hours ruminating on the point.”

“He is everything you want in a silk and a leader in this field. He is strong strategically and allows his team to work well together and to the best of their abilities.”

HNW 2018

Ranked as a “*Star Individual*”, Simon Taube QC is described as ‘ “*one of the most authoritative silks*” who has been “*long-regarded as one of the top chancery QCs for trusts and estates.*”

He has extensive experience handling significant trust disputes on both a domestic and international basis and is widely admired for tackling complex matters. One lawyer reports: “*His mastery of paperwork is unrivalled and he has been proved right on many occasions. He has a great track record at the Bar.*”

Another source adds: “*His written advice is impeccable and his line of argument was one of the most reasonable and persuasive things I have ever read.*” Taube is also praised for his “*persuasive advocacy style*” and for being “*outstanding in court.*”‘

Chambers UK 2018 - Chancery: Traditional (Band 1)

‘A go-to silk for major trusts, estates and tax issues’.

“Undoubtedly one of the best QCs technically in terms of contentious trusts.” “He is absolutely outstanding and one of the brightest performers at the Chancery Bar.”

Chambers UK 2018 - Offshore

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“For trusts law he is head and shoulders above the vast majority at the Bar. He is phenomenally clever, and clients regard him as an obvious choice for the really, really big cases.”

Chambers Global 2017 - Offshore

“one of the most prominent trust practitioners and involved in some very high-profile cases.” He deals with a range of complex and high-value matters, both in the UK courts and overseas, and is further described as “extremely intellectual and one of the best advocates you will come across.” One legal insider enthuses: “He is extremely good at thinking about overall strategy. He is an extremely skilled wordsmith and can get to the core of an issue and analyse it correctly within minutes; even when us other lawyers have spent hours ruminating on the point.” Another market source comments: “He is everything you want in a silk and is a leader in this field.” His overall understanding of the market is also praised and a wealth expert remarks: “He is hugely knowledgeable about the industry and his expertise of the whole trust world is very impressive.”

Chambers HNW Guide 2017

“Remarkably erudite and authoritative,” he is “brilliant at masterminding the strategy in a case.” “He knows the law backwards and if he says something is right you’d be unwise to challenge it.”

Chambers Global 2017

“Undoubtedly one of the best QCs technically in terms of contentious trusts.” “He is absolutely outstanding and one of the brightest performers at the Chancery Bar.”

Chambers UK 2018 - Offshore

“An extremely skilled wordsmith, who can get to the core of an issue and analyse it correctly within minutes, even when others have spent hours ruminating on the point.” “He is everything you want in a silk and a leader in this field. He is strong strategically and allows his team to work well together and to the best of their abilities.”

Chambers UK 2018

“Hugely experienced and respected barrister who is an expert in both contentions and non-contentious trusts cases, and has appeared in a wide number of jurisdictions”. □ “Remarkably erudite and authoritative,” he is “brilliant at masterminding the strategy in a case.” “He knows the law backwards and if he says something is right you’d be unwise to challenge it.”

Chambers UK 2017 - Trusts (Band 1)

“A go-to silk for major trusts, estates and tax issues”, “For trusts law he is head and shoulders above the vast majority at the Bar. He is phenomenally clever, and clients regard him as an obvious choice for the really, really big cases.”

Chambers UK 2017 - Offshore (Band 1)

“Star individual instructed to handle high-value litigation and top-quality advisory matters.” “He’s top of the tree. He is very good at strategic masterminding. If you want an opinion that’s likely to squash your opponent and stop something in its tracks, Simon Taube is go-to.”

Chambers UK 2017 - Chancery: Traditional (Star Individual)

Leading silk who frequently represents parties in some of the most prominent charity litigation in the UK and other

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common law jurisdictions. “He is extremely knowledgeable and provides comprehensive and clear advice.”

Chambers UK 2017 - Charities (Band 1)

“Absolutely first class and one of the very big names at the Chancery Bar.”

Legal 500 2016 - Charities (Tier 1)

“Simply the brightest of his generation at the Bar and always a pleasure to instruct.” “An outstanding trusts lawyer with excellent depth of knowledge.” “He is one of the biggest cheeses of the Chancery Bar and you know you have a serious case if he is involved.”

Chambers UK 2016 - Chancery: Traditional (Star Individual)

“Simply the brightest of his generation at the Bar.”

“A big name at the chancery Bar.”

“Very able, bright and technical. Forceful and thoughtful.”

“He is great! He takes it all in his stride and keeps things running smoothly.”

“He is phenomenally bright and has impeccable judgment. His advice is always concise and clear.”

Chambers HNW 2016

“Absolutely first class and one of the very big names at the Chancery Bar.”

Legal 500 2016 - Charities

Sought after by city solicitors for his litigation and advisory work in relation to UK and foreign trusts and estates. He focuses on trusts, tax planning and personal taxation and handles disputes in a range of common law jurisdictions.”If you want very top-notch, far-sighted advice then he is your man. He is the best chancery draftsman I know, as he understands all aspects of trusts and carefully crafts complex documents with the right outcomes.”

Chambers Global 2016 - Private Wealth: Trusts (Band 1)

“Simon Taube is amongst the very top flight of chancery silks: erudite, responsive, excellent judgement and a very persuasive but authoritative advocacy manner. You absolutely want him on your side whether for advisory or contentious work.”

Citywealth 2016

Simon Taube QC is a “top name” at the bar whose “impressive breadth of expertise allows him to turn his hand to all chancery matters”. He is a “standout individual” who is praised for his “analytical mind” and “ability to get to the heart of the problem”.

Whos Who Legal 2016

“Determination, massive intellect and a nose for his opponents’ weaknesses make him both a brilliant advocate and adviser.”

Chambers UK 2015 - Chancery: Traditional (Star Individual)

He continues to receive frequent mandates in relation to charities cases, particularly those of a contentious nature.

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“He got to grips with some very complicated issues in an extremely limited timescale” “An effective and able advocate who has a top practice.”

Chambers UK 2015 - Charities

## Qualifications

- Modern History (First), Merton College, Oxford (1978)

## Associations & Memberships

- ACTAPS
- Chancery Bar Association
- International Academy of Trust & Estate Law
- STEP

## Publications

Simon has contributed regularly to legal books and journals including most recently:

- STEP Bermuda
- Trust & Trustees – Oxford University Press
  - Grafting the English Trust on to the Code Civil
  - [Service of trust claims out of the jurisdiction: widening the gateways](#)

## Speaking Engagements

Simon is regularly invited to speak at national and international conferences.

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