



## SIMON TAUBE KC

Call: 1980 | Silk: 2000

”SIMON IS INTENSELY INTELLIGENT AND HIGHLY FOCUSED. HIS ATTENTION TO THE FINER DETAILS IS A JOY TO BEHOLD.”

Chambers UK 2025

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Simon Taube KC is a leading Silk whose practice covers the full spectrum of traditional Chancery work, both litigation and advisory work.

He is instructed in cases in England and in common law jurisdictions abroad. His special expertise includes UK and foreign trusts and estates, charities, capital tax planning and trust taxation, and fiduciary duties. He also has wide experience in property, securities, partnership, professional negligence and family provision matters.

Recent reported cases include:

- Re X Trusts (2023) Bermuda Court of Appeal
- Stewart & Others v Cromwell Trust Company Ltd (2023) Bahamas Court of Appeal
- Equity Trust (Jersey) Ltd v Halabi; ITG Ltd v Fort Trustees Ltd [2022] UKPC 36
- Rittson-Thomas v Oxfordshire County Council [2021] UKSC 13
- Dawson-Damer v Taylor Wessing LLP [2020] EWCA (Civ) 352
- Lehtimaki & Others v Cooper; Re Children’s Investment Fund Foundation [2020] UKSC 33

## EXPERTISE

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## CHARITIES

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Simon Taube KC 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.



## CONTENTIOUS TRUSTS & ESTATES

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A specialist onshore and offshore chancery litigation expert. Simon Taube KC 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) Ocatello 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.
- **Labrouche 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)

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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.

### 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.

## TAX



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

## ARBITRATION

## DIRECTORIES & AWARDS



## ASSOCIATIONS & MEMBERSHIPS

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

## AWARDS

Winner of the Legal 500 2015 'Silk of the Year' award for Private Client: Trusts and Probate.

## EDUCATION & QUALIFICATIONS

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

## 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](#)

## REGULATORY INFORMATION

Simon Taube KC is a self-employed, independent barrister whose practice is governed by the Code of Conduct of the Bar of England and Wales. He is regulated by The Bar Standards Board [Bar Ref 17569] and is fully insured with the Bar Mutual Indemnity Fund [BMIF Ref 2360/035] to provide legal services, please refer to the [BMIF website](#) for full details of the world-wide cover provided. He is registered for VAT under the reference 362388437.