



YOUR TRUST IN OUR HANDS

Stonehage Fleming Expert Fiduciary offers a full range of fiduciary services including trusteeship, directorship, corporate secretarial, trust and estate administration, nominee services and executorship.

REALISING YOUR VISION FOR SUCCESSION

We have both the technical expertise and the commercial experience to hold an exceptionally wide variety of assets, including private companies, business ventures, property, art collections, aircraft and marine vessels, as well as diversified investment portfolios.

Trusts are frequently an integral part of inter-generational succession planning and as trustees we support families in passing on their legacy.

We have highly qualified trust officers, lawyers and accountants making up our two principal fiduciary teams in Jersey and Switzerland. They are proficient in the establishment and administration of structures incorporating entities from a wide range of international financial centres. These include Jersey, Switzerland, British Virgin Islands, Guernsey,

Cayman Islands, Mauritius, Luxembourg, Cyprus, Isle of Man, Singapore and New Zealand.

In addition, our South African and United States offices establish and administer South African and United States trusts, and act as independent trustees.

We specialise in helping individuals and families structure their finances to realise their vision of how their wealth should be managed and passed smoothly down to future generations. In some instances the next generation will be ready to step into the shoes of their predecessors and carry on business as usual. In others the transition necessitates a substantial change in the asset mix, which needs to be carefully planned and managed, with due regard for family as well as commercial considerations.

A CLOSER WORKING RELATIONSHIP

Whilst the needs of our clients, their families and the structures we establish on their behalf vary widely, our trustees always maintain close contact with settlors and, where appropriate, beneficiaries. We encourage regular meetings within the context of family governance regimes.

We will provide corporate trustees or, where appropriate, senior board level executives able to act as trustees and provide high-level commercial, legal or other technical expertise. Stonehage Fleming trustees commonly sit on the boards of family companies representing family interests.

INDEPENDENT TRUSTESHIP

Stonehage Fleming combines the advantages of a privately-owned and managed business with the benefits of substantial scale. This enables us to offer an exceptionally broad range of expertise and global capability. Although we have thirteen offices around the world, achieving global reach

through an extensive network of associates, we are still independently owned, with the majority of shares in the hands of long-serving management. This means we can take a long-term view and ensure you benefit from assured continuity in your relationships with our senior team.

EXTRAORDINARY DISCRETION

Meticulous attention to detail coupled with extraordinary discretion is at the heart of trusteeship. We strive to protect the interests of all beneficiaries, including their rights to privacy,

and to ensure optimum tax efficiency and full cross-border compliance in an increasingly complex regulatory environment.

MAKING THE COMPLEX SIMPLE

However you wish to work with us, you will always have a principal point of contact. This makes your relationship with us simple and straightforward, and ensures that the management of individual aspects of your family's finances is always considered in the context of your broader arrangements.

To find out more, simply contact your Stonehage Fleming adviser
email: enquiries@stonehagefleming.com or visit: stonehagefleming.com

