

**APPLEBY**

GLOBAL SERVICES

WEALTH STRUCTURING  
& FAMILY OFFICE  
SERVICES



# WEALTH STRUCTURING & FAMILY OFFICE SERVICES

APPLEBY GLOBAL SERVICES (AGS) IS ONE OF THE WORLD'S LEADING CORPORATE AND FIDUCIARY SERVICE PROVIDERS. OUR GLOBAL TEAM OF EXPERTS ADD VALUE AND DELIVER OPERATIONAL EXCELLENCE TO PUBLIC AND PRIVATE COMPANIES, FINANCIAL INSTITUTIONS AND PRIVATE INDIVIDUALS.

AGS provides expert Corporate and Fund Administration, Regulatory and Financial reporting, and Fiduciary and Family Office services. Our dedicated team of experienced professionals work to fulfil our priority of delivering an unmatched value proposition to clients with the operational excellence that they seek.

We have offices in seven highly regarded, well-regulated global locations that enable us to deliver a globally integrated range of services. Our office locations include the key international jurisdictions of Bermuda, the Cayman Islands, Jersey, Mauritius, and the Seychelles, as well as the international financial centres of Hong Kong and Shanghai.

AGS' dedicated team of experienced professionals work closely with Appleby's legal specialists to provide our clients with an integrated legal and fiduciary offering.

## OUR WEALTH STRUCTURING & FAMILY OFFICE SERVICES

High-net-worth individuals (HNWIs) seek out a wide range of solutions in a variety of industries and sectors, depending on their very special needs. Although there is not an official definition of HNWI, the threshold for high net worth is generally understood to include liquid assets and exclude real assets. A high-net-worth individual is a person who owns liquid assets valued at \$1 million or more, typically:

- High-net-worth individuals (HNWIs) own liquid assets between \$1 million and \$5 million
- Very-high-net-worth individuals (VHNWIs) own liquid assets valued between \$5 million and \$30 million
- Ultra-high-net-worth individuals (UHNWIs) own more than \$30 million in liquid assets

Such circumstances require a range of services from providers and managers such as fiduciary services, trust management, estate planning and access to a variety of financial services experts. The stakes are exceptionally high and individuals at this level need absolute confidence in providers to deliver at the standards that they are accustomed to.

Our priority is to provide quality service that will help you achieve asset security and financial independence for you and your successors, and our AGS offices are ideally located to help our clients in these efforts.

AGS operates in all the most sought-after locations for the establishment of your Family Office. Bermuda and the Cayman Islands are two of the best destinations to manage and secure your legacy and enjoy your financial success. We can also help you in acquiring residency in these jurisdictions or elsewhere in the world and will provide guidance and advice so you can make long term decisions based on accurate information.

We are committed to providing you with the expertise and knowledge that you need, in the discreet and private manner that the future of your financial security deserves. Our team of experts will advise you on the best structure capable of meeting your specific goals and will assist you in putting all the pieces together. We set up and manage trusts, foundations, companies, funds and single or multi-family offices that keep secure the rewards of your operating business, investments, real estate assets, private recreation vehicles and intellectual property interests.

The well-being and success of our clients is our commitment and we will always respect your confidence in keeping absolute confidentiality as a priority. Depending on your needs, you can expect these services from AGS:

- Governance and restructuring advice
- Trustee Services
- Trust, company and foundation formation
- Oversight of investment vehicles including private equity
- Private recreational vehicle registration
- Accounting and financial reporting services
- Compliance services
- Immigration services

Find out more about our services and how AGS may partner with you and your business by contacting us at your preferred office.

## KEY CONTACTS



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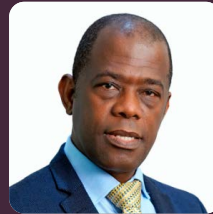
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