



TMF
GROUP

**Private client
services**



Private client services

Let us take the weight off your shoulders

Managing personal wealth has become an increasingly complex process. Global opportunities and changing economic and regulatory environments have created the need for constant evaluation and, more importantly, sophisticated solutions. As a result, having a service provider that understands the intricacies and challenges of effective wealth management is absolutely critical.

We have one common goal: to create and maintain solutions that protect and enhance your assets. We make it our priority to understand your current circumstances and future aspirations. From here, we can devise, and then present, the options available to you.

Our private client teams create and administer solutions that will provide for extended families, manage multiple, complex, cross-border assets, navigate tax and regulatory issues, provide for estate and business succession planning and facilitate effective investments now and for the future.



Your cross-border operations and investments – compliance assured

As the complexity and risks of managing your international operations and investments intensify, you need a partner able to navigate the details of local compliance requirements.

Global coverage – local delivery

With over 100 wholly-owned offices worldwide, TMF Group offers a comprehensive range of compliance and administrative services which are critical for clients from a financial, reputation and risk management perspective. Our services are delivered in each country by our expert staff, professionals who have the key local knowledge and speak the language.

TMF's international client base is highly diversified, including many Fortune 500 and FTSE quoted companies. Over the years we have formed specialist teams in supporting different niche sectors, including structured finance, fund administration, real estate investment, private equity, IP licensing and collection, private wealth, and pension and employee benefits solutions.

■ What we do

- Work with you, and your advisors, to devise effective solutions for your needs
- Establish and administer structures
- Provide full trustee, foundation and corporate management services
- Incorporate and administer Special Purpose Vehicles (SPVs)
- Register private vessels and aircrafts
- Carry out tax and regulatory compliance
- Offer investment manager selection and analytical performance reporting
- Probate and estate administration services

We work closely with accountants, lawyers, financial advisors, tax consultants and other financial service providers – in fact we have many of these professionals in-house.

■ Our solutions

With offices in key locations – that allow individuals to maximize wealth – our structures provide for:

- Estate planning for future generations
- Management of lifestyle assets like yachts, planes and art
- Succession planning that minimizes business continuity costs
- Wealth preservation initiatives devised by regularly reviewing and reporting portfolio performance
- Risk management by limiting personal liability and taking advantage of favourable legislative regimes in various jurisdictions
- Taxation planning / mitigation by taking advantage of favourable legislative regimens and Double Tax Agreements
- Philanthropy by facilitating the ability to donate money or goods to support a charitable cause

■ Independence of choice

TMF is independent. This means we are free to work with your existing auditors, advisors or banks without you having to worry about corporate governance or local regulator restrictions.



PRIVATE CLIENT SERVICES TEAM

To learn more about how our private client services team can be able to help you, please send an e-mail to private.clients@tmf-group.com.

Our international staff is available to answer any questions you may have.



TMF
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Simplified international management

We offer a single point-of-contact for all clients, wherever they are doing business. Your Account Manager will work with you to gain an in-depth understanding of your objectives and plans, and will ensure that these are fully communicated to our local professionals and acted upon in full. This ensures seamless day-to-day communication and management across multiple jurisdictions, keeping all your interests on track.

Operational excellence

We are committed to constantly improving our service so that you are assured of world-class standards in delivery and satisfaction. This includes industry standard quality measures and controls, ensuring you always receive the timely data and analysis needed to support your decision making and business planning.

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