



INTERNATIONAL FIDUCIARY SERVICES

from Nedgroup Trust



PRIVATE WEALTH
SINCE 1834

LEAVING A GROWING LEGACY

Nedgroup Trust is the trust division of Nedbank Private Wealth, a company which can trace its heritage back to one of the oldest trust companies in the world. The gateways to our international trust and company services, for individuals and corporates, are through our offices in Jersey and Guernsey, both of which are leading international financial centres, with worldwide recognition as respected and highly regulated jurisdictions.

Our experienced administration and management teams will work closely with you and with your professional advisers to help manage the complexity of providing individual tailored solutions to efficiently manage family and business wealth assets.

WHY NEDGROUP TRUST?

- We offer the security of being part of a large multinational financial services group.
- We work closely with you and your advisers in setting up and administering bespoke, efficient structures to suit your individual requirements. Our staff are highly qualified, experienced and skilled in providing a wide variety of services, from setting up and administering a basic trust or company structure to sophisticated and highly complex fiduciary arrangements.
- We pride ourselves on maintaining high levels of confidentiality, information security and professionalism, while always providing a personal service.
- We are able to establish and administer offshore structures involving multiple jurisdictions from our offices in both Jersey and Guernsey. Jersey and Guernsey are located in the Channel Islands, protected by the British Crown, but independent since the 13th century. The islands offer political stability and constitutional independence from the UK, having their own legislatures, judicial systems and tax laws. Jersey and Guernsey are among the world's premier financial centres, and enjoy easy access to a wide range of professionals well versed in the complexity of international finance.

WHAT WE OFFER

BESPOKE FIDUCIARY SERVICES FOR YOU

We provide bespoke fiduciary services to a sophisticated private client and corporate client base involving multiple jurisdictions. We have a wealth of experience in administering a diverse range of structures, including many types of trusts and companies, foundations and SPVs (special purpose vehicles), as well as a variety of asset classes including residential and commercial property, managed investment portfolios, private companies, chattels and image rights.

Our clients benefit from a three-tiered relationship with a trust director, a trust manager and a dedicated trust officer, depending upon the level of experience and expertise required for a particular transaction.

We are also able to exercise complete impartiality in relation to the appointment of third-party advisers and managers, such as investment managers, tax and legal advisers, bankers and property managers. Alternatively, where it suits your needs, we can offer you all or any of Nedbank Private Wealth's banking, lending and investment related services.

FIDUCIARY SERVICES FOR PROFESSIONAL ADVISERS

Nedgroup Trust has been offering private client fiduciary services tailored specifically for wealth managers and advisers since 1990.

Understandably, individuals considering the establishment of a trust arrangement may wish to retain established and valued relationships with existing financial advisers, even though assets (often life bonds and offshore wrappers) are to be settled into trust. With this in mind, Nedgroup Trust offers a specialised fiduciary service designed, where appropriate, to continue the relationship with the IFA as investment adviser to the trust, while maintaining fiduciary duties and levels of service at all times.

As a bank-owned trust company, we can offer banking facilities while maintaining our strict policy of not cross-selling competing services.

EMPLOYEE AND RETIREMENT BENEFIT SCHEMES

Companies are recognising the importance of employee and retirement benefits in order to retain and attract personnel. These structures are constructed on a bespoke basis to suit an employer's criteria in providing a variety of benefits. The most common being share-based incentive and international pension arrangements. Many of these benefit arrangements are fairly complex and can involve several different jurisdictions. It is often sensible to organise such plans through tax-neutral financial centres such as Jersey and Guernsey.

QNUPS (qualifying non-UK pension schemes) can be used by UK residents as a flexible mechanism for providing retirement benefits. They are particularly useful as "top-up" pensions if an individual has not made sufficient provision for their retirement via their registered pension, or has already utilised their maximum income tax relieviable pension contributions.

OUR SERVICES

- Private trust formation and administration
- Foundation formation and administration
- Company formation and administration
- Formation and administration of employee benefit trusts and employee incentive arrangements
- Formation and administration of international corporate pension and savings-related arrangements
- QNUPS

Please refer to the individual factsheets available for more details on the services we offer.

POTENTIAL BENEFITS FOR YOU

WEALTH PRESERVATION

Consolidation of family wealth in an overarching structure provides simplification and safeguards the interests of minors or vulnerable members of the family, and affords protection against loss of assets through unforeseen adverse events, such as divorce or professional liability.

SUCCESSION PLANNING

Facilitation of the smooth transfer of wealth to family members, either during your lifetime or after your death, with the ability to avoid forced heirship provisions.

SECURITY AND CONFIDENTIALITY

For political, economic and social reasons, holding your assets in a well-regulated and stable jurisdiction can provide peace of mind.

TAX EFFICIENCY

Structuring assets efficiently can legally mitigate taxation in appropriate circumstances.

IMMIGRATION/EMIGRATION

Prior to arrival in a new country, or return to your own country of origin, planning may be necessary to protect assets which are outside the country of destination.

INCENTIVISING EMPLOYEES

Employers are increasingly using incentive arrangements such as equity-linked, retirement and savings-related products to attract and retain staff.

If you are interested in considering ways in which Nedgroup Trust can help you to preserve and enhance your wealth, now and for future generations, please contact us at Nedgroup Trust using the details overleaf.



CONTACT US

Should you need any further information, please call, fax or email us, or visit our website at www.nedbankprivatewealth.com

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Nedgroup Trust is a registered trade name of Nedgroup Trust Limited and Nedgroup Trust (Jersey) Limited.

Nedgroup Trust (Jersey) Limited is regulated by the Jersey Financial Services Commission.

Nedgroup Trust Limited is licensed by the Guernsey Financial Services Commission under the Regulation of Fiduciaries Administration Businesses and Company Directors, etc. (Bailiwick of Guernsey) Law, 2000 to carry out Fiduciary Duties and Company Administration. Company Registration No. 23460.

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