

International family office service

A family office is traditionally a private office that manages the investments and trusts for a family group, providing personalised care and focused strategic direction of a family's interests, supervising its investments, managing its legal affairs and tax compliance and assisting in identifying and achieving family objectives in an efficient and effective manner. As the office of choice of some of the world's wealthiest families, Maitland offers a confidential, tailored, international family office service to high net worth families.

A single interface between a family and all its affairs

Protecting reputation, privacy and confidentiality

A unique service designed for each family

Meeting the highest expectations

Our personalised and partner-led international family office service allows families to identify their core values and strategic objectives and actively manage their affairs while knowing that we will implement their decisions and supervise their affairs.

Whether your family needs to centralise the management of its private and business interests through a single location, or wishes to separate its private and commercial affairs, we can help you.

For the preservation of established family wealth and perpetuity of success you may wish to engage our full family office service where we will act as a single interface between your family and all its affairs.

Flexibility

If you have a smaller family structure you may prefer simply to "buy in" investment advice, administrative, corporate, trust and compliance services and legal expertise, all of which we offer as and when required.

Depending on what you prefer, our service can be comprehensive, taking full charge of family affairs, or it can be undertaken with a light touch, so that you have a friendly and specialist consultant to stand beside family members taking key decisions.

The core service

When your family appoints us as its family office, we designate someone from our team to oversee the provision of services to the family office – the family's expert.

This individual takes the necessary time to understand and get to know your family and its circumstances and to define and record family objectives and strategies. With this knowledge, your expert will:

- assume responsibility for ensuring that the family's structures are efficient and well managed
- keep abreast of changing circumstances
- ensure that the family's wishes and objectives are respected
- systematically incorporate the family's cultural values and governance issues in the handling of its interests and acquisitions
- reduce the risk of conflict between members of present and future generations.

This core service is important at all times, but is of particular value when a family goes through a period of transition, such as when a family leader passes away or an acquisition is made.

A full range of underlying services

We are uniquely placed to provide a full range of underlying services. These include:

- Private trust companies
- Trust and company administration
- Investment programmes
- Management of legal affairs
- Succession and tax planning
- Fiscal and regulatory compliance
- Yacht and aircraft acquisition
- Philanthropic programmes

Maitland's legal services team also advises on a full range of international corporate and commercial transactions and can bring this expertise to bear seamlessly as circumstances dictate.

Strategic approach

We offer a personal, confidential and trusted advisory service to the family. If you wish, your Maitland expert can sit on the family's board of executives to ensure the smooth and equitable running of its affairs.

Proactive & Circumspect

Will Maitland come to me with new ideas?

Our clients have come to expect it. Many of them have been with us for decades, and the relationships are still as fresh as the day we met. That's because we are continually re-invigorating their strategies and solutions with new perspectives and approaches. We look at their affairs from every angle.

This ensures continued commercial success as well as the creation, preservation and management of their wealth.

It's not just about having the ideas – we make them happen.

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We assist with the maintenance of good governance to avoid family conflict and we will strive to protect your family's reputation, ensuring perpetuity and a legacy for future generations.

In developing a strategy for your family office, we ensure that the family's financial, personal and philanthropic objectives are considered in the context of its attitude to risk. The strategy will harmonise the family's financial interests with its culture, paying due regard to the needs, aspirations and concerns of each family member. If you have a specific philanthropic objective we will help to give effect to this and observe the family's wishes regarding its benevolence, such as secrecy or encouragement to others to follow suit.

We help define a succession plan for all key service providers to the family's interests, and the wisdom and knowledge of key family members will be documented and available to the structures in the future.

Safeguarding and investing wealth

We can help your family select and manage its investments and hold them in structures which are the most suitable to minimise fiscal and regulatory exposure, wherever they are located. We are experienced in designing investment strategies, choosing investment managers and providing consolidated reporting on your family's investments via our Panoptes service.

When your family wishes to purchase a new asset such as a home, yacht or aircraft we ensure that the acquisition is financed and held in the most appropriate structure. We also facilitate each step of the process.

Efficient management

Our family office service aims not only to define and achieve family objectives, but also to give you confidence in that your affairs are efficiently and effectively managed. This includes:

- keeping you abreast of ever-changing complex fiscal and regulatory requirements in various parts of the world. We do regular checks on your structures to ensure that they provide maximum protection and benefit for the family;

- understanding and keeping watch over the international tax situation of each family member and of the trusts pertaining to family interests, including attending meetings to account to family members or to communicate between family members and trustees or board members;
- reviewing and approving whether tax and disclosures filings to governmental authorities are required, and if required taking steps to ensure accuracy and consistency with the structures;
- ensuring that the structures achieve their objectives;
- monitoring investments or cash with appropriate reporting;
- overseeing the record-keeping, maintenance and safe storage of a complete set of documents pertaining to family interests;
- assisting the family with the fiscal consequences of cross-border moves, the acquisition of property or significant investments.

About Maitland

Maitland is a privately owned, international firm providing wealth services to both private and institutional clients.

We provide the highest levels of expertise and competence and work in a way that is uniquely personal, proactive and responsive.

We work with our clients and not just for them, from offices in the British Virgin Islands, Cape Town, Dublin, Durban, Geneva, Isle of Man, Johannesburg, London, Luxembourg, Malta and Monaco. Maitland is one of the few wealth services groups with the breadth of knowledge and insight to create integrated, comprehensive global solutions.

Key contacts

Anthony Markham

Isle of Man

Tel: +44 (0)1624 630024

anthony.markham@maitlandgroup.com

John Mills

Luxembourg

Tel: +352 402 505400

john.mills@maitlandgroup.com

Dirk Oppelaar

Geneva

Tel: +41 22 5928870

dirk.oppelaar@maitlandgroup.com

For further information on Maitland please visit our website at maitlandgroup.com

