



KPMG in the Crown Dependencies

Family Office & Private Client Services

Working towards the future



KPMG's Family Office and Private Client team understands that every family, private client and private enterprise is different. We are committed to developing long term relationships with you, your family and your business.

The past 12 months have presented the world with unprecedented challenges. We work with families from all across the world seeking to understand their objectives and aspirations for today and the future. The Crown Dependencies offer stable, tax neutral jurisdictions with incredible private wealth experience and the local KPMG Family Office and Private Client team work with our global network to find the right solutions for our clients.

Helping you on your journey



Establish

Helping families set up family offices that meet their needs



Operate

Working with the family business on matters of governance



Grow

Setting strategy and providing targeted expertise for different assets



Preserve

Helping established families to protect their legacies

Why Crown Dependencies?

Jersey, Guernsey and the Isle of Man are all different and our cross island team of Family Office advisers can work with you to understand the core characteristics that bring the three islands together as well as the nuances you need to be aware of which make one island more attractive to your structure over another.

Tax Neutral

- 0% headline corporate tax rate
- Fiscal neutrality for non-residents
- Beneficial tax regimes for high earners & individuals with family office setups
- Wide range of double tax agreements

Proximity

- Close proximity to UK & Europe allowing hands on access to the family office
- Central time zone

Stable and private

- Self-governed jurisdictions with independent fiscal & administrative policies
- No public UBO register

Regulatory Environment

- A robust domestic regulatory framework with backing from various bodies on the international stage such as the OECD, Moneyval & the IMF
- Prudent approach to risk

Expertise

- Exceptional financial service professionals with trustees, bankers, accountants and lawyers.
- Established legal framework that is flexible and robust and serves the bespoke needs of international families.

Established and varied private wealth structures

- Long established trust law
- Foundations
- Sharia Law experts

Established and flexible structures

Trust

- Preferred vehicle of choice for protection of assets
- Built to manage flexible succession planning

Limited Company

- Most common entity seen in offshore structures
- Limited liability
- Recognised internationally

Private Trust Company

- Maintain control & confidentiality over trust arrangements
- Ability to operate rapid decision making
- Dedicated trustee service with full attention granted

Foundation

- Hybrid entity which merges aspects from both a corporate body and trust
- Ideal alternative for civil law jurisdictions where trusts are less recognised

Family Investment Company

- Cost effective mechanism for managing family investments
- Provides a “light-touch” regulation which assists with family governance and accountability

Private Investment Fund

- Specific regime with additional regulatory flexibility
- Managements relationship with investors typically closer

Service offerings



International tax compliance & advisory



Cyber Security



Family & corporate Governance



Risk, Compliance & Regulatory



Strategy consulting

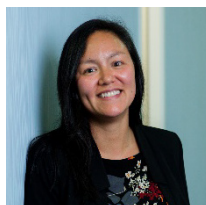


Transaction & Deal Advisory

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