



## A BRIEF INTRODUCTION

by

Shane Giles, Founder and CEO

## BACKGROUND



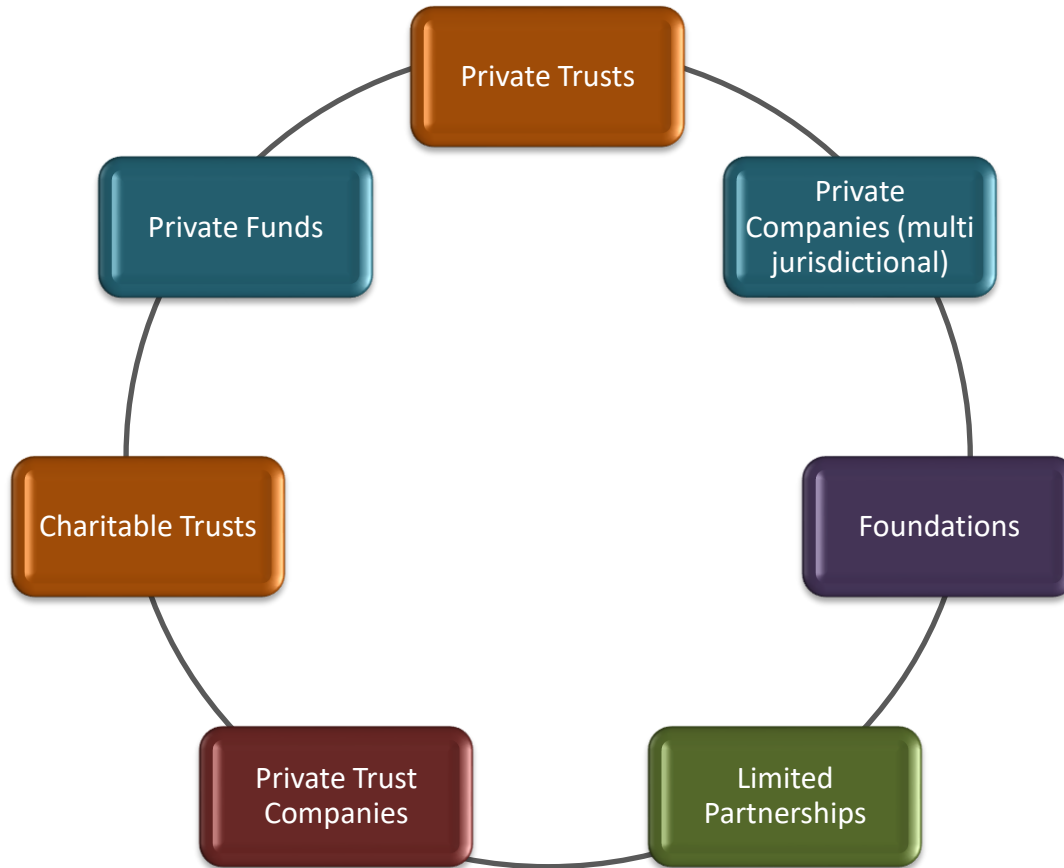
- FORMED: 2002
  - OWNERSHIP:
    - 100% “owner managed”
    - NO Institutional or private equity stakeholders
  - LOCATION: Guernsey, Channel Islands – a leading Intl. Finance Centre
  - REGULATION: by [Guernsey Financial Services Commission](#), under the Fiduciaries, Administration Businesses and Company Directors legislation
- STAFF: 25+ professionals including Fiduciary practitioners, lawyers, chartered and management accountants, bankers, compliance, chartered secretaries.
  - EXECUTIVE: 130+ years of Fiduciary industry experience
  - AWARDS: Various including – STEP Global – Independent Trust Company of the Year

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## SERVICES - FIDUCIARY

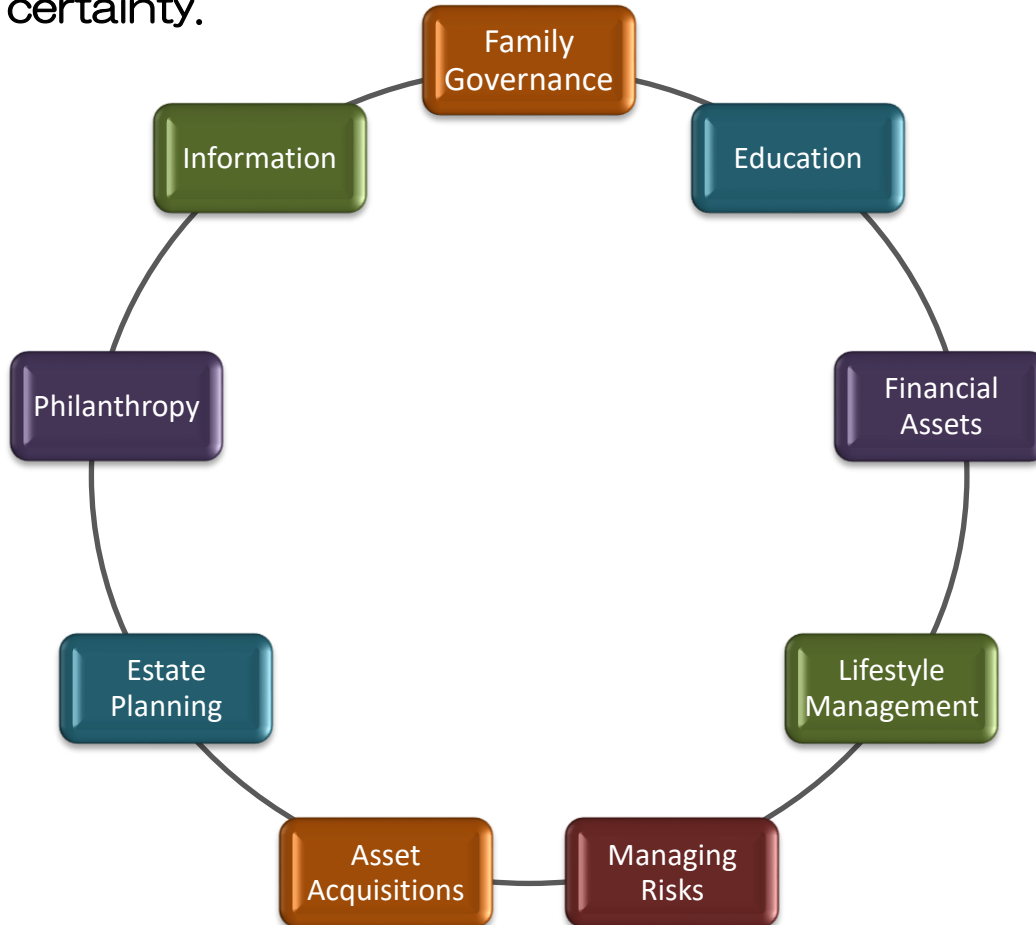
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A comprehensive suite of services providing formation, management and administration services in relation to:



## SERVICES - FAMILY OFFICE

Some clients prefer to entrust some of their wider needs to Opus for safety, convenience and certainty.



For further information about our fiduciary and family office services please see [specific factsheets](#).

## FEES AND COSTS

Flexibility is essential to ensure clients receive value and certainty when engaging the services of Opus. Our basis is centred upon responsibility and activity.

### FORMATION COSTS

- Time spent subject to a minimum fixed charge

### ANNUAL FEES

Clients have the option of either :

- An Annual retainer fee plus time spent
- A Fixed fee

Note: NO Ad Valorem fee applies

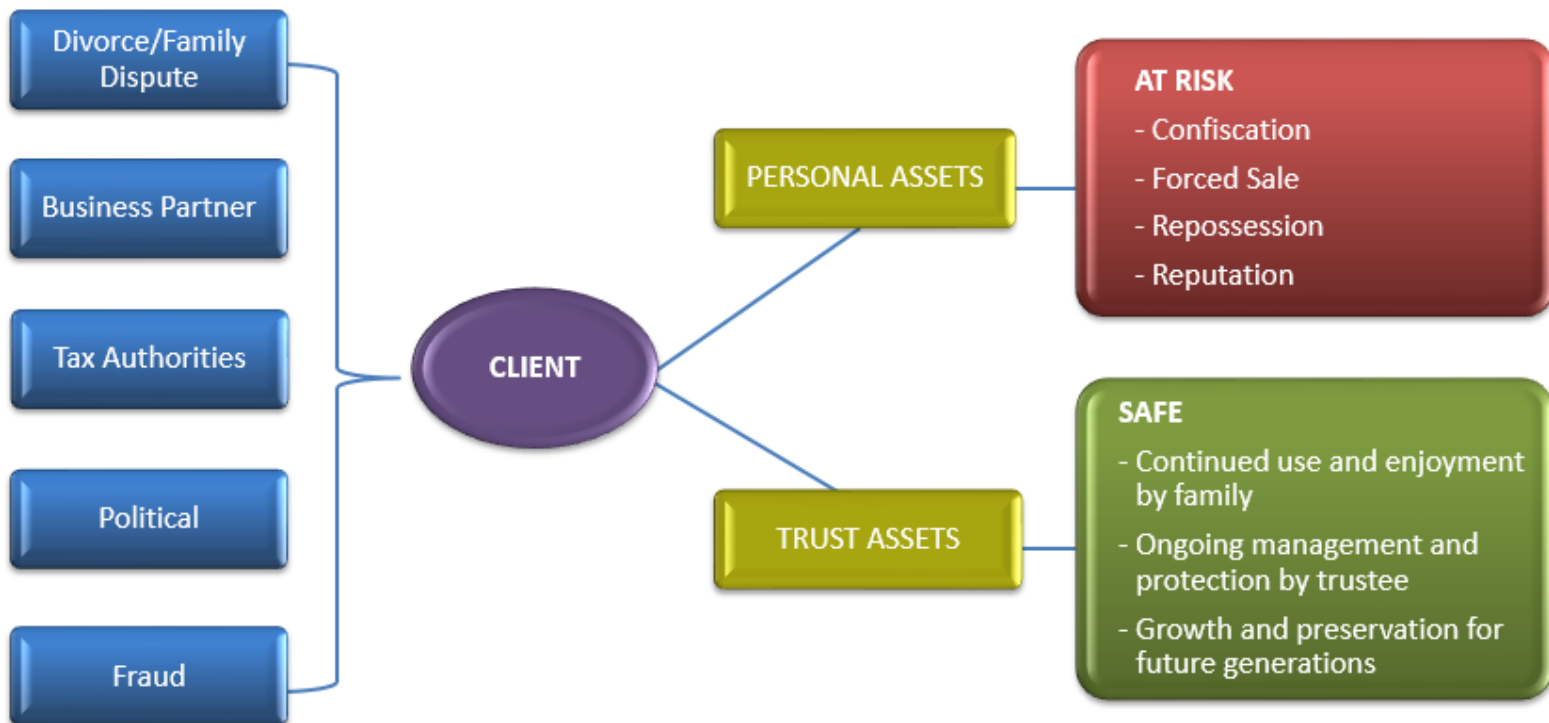
### THIRD PARTY COSTS

- Settled directly from the client entity



## RISK MANAGEMENT

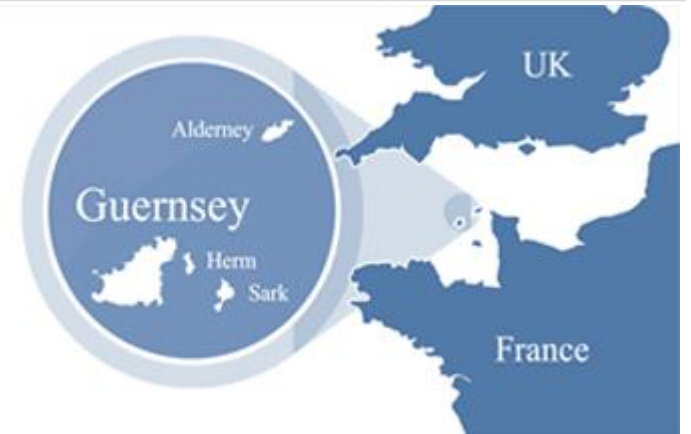
As can be seen from the diagram below Financial structures can be a valuable component in any risk management strategy but Opus also arranges many other solutions. Our [Risk Timeline](#) document summarises many of the key risks facing our clients today.



## GUERNSEY - A TRUE SAFEHAVEN

A Guernsey based centre of operations provides clients with an ideal location from where structures and activities can be executed, managed and monitored safe in the knowledge that:

- Robust laws uphold and protect the interests of the individual.
- Regulations ensure the highest standards of care and professionalism exist.
- The islands infrastructure enables all key services to be fully supported.



Guernsey

In these uncertain and complex times Guernsey's attraction as a ideal location for wealthy families to make their home has increased significantly. Opus works closely with the [Locate Guernsey](#) agency to bring about these opportunities.

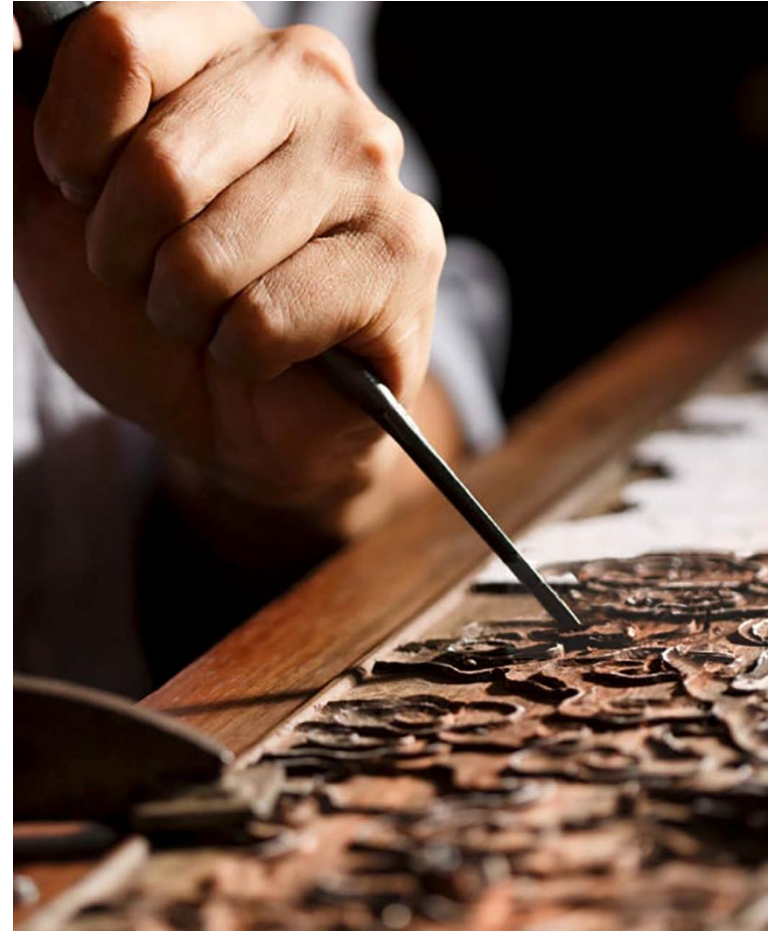


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## PHILOSOPHY

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- Client is our **No.1** priority
- **Attention to Detail**
- Be **Proactive**, find **Solutions**
- **Independence** and **Impartiality** are critical
- Provide **Value** and **Safety**
- **Trustworthy**, **Loyal** and **Reliable**
- **Peace of Mind** and a **Long Term Home**





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## OUR CLIENTS' NEEDS

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- Our clients comprise internationally situated individuals and families in need of financial structures or the services of a Private Office.
- Many seek the safety that comes from combining the independence of Opus with the robust protection that Guernsey has to offer.
- Our strong network of professional contacts situated throughout the globe enable us to handle a diverse array of asset types and interests working closely with clients' own advisors.
- We strive to provide the correct level of involvement with the client and his or her own advisors to ensure the relationship runs smoothly and efficiently.
- Our proximity to London and Europe is an attraction to many who live or conduct business through these locations.
- Most of our clients have enjoyed a long standing relationship with Opus and we pride ourselves on our client servicing standards and attention to detail.
- All our clients require a highly professional, discrete and reliable service designed to provide long term solutions and peace of mind.

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## FURTHER INFORMATION

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