

FIDUCIARY SERVICES

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FACT SHEET

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# An introduction to Wealth Structuring

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## Who we are

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Opus Private is an independent regulated fiduciary and family office services company with offices in Guernsey, London and Dubai.

We focus on the provision of bespoke single and multiple family office advisory services to ultra high net worth business families internationally.

Our services include:

- Family and corporate governance
- Family advisory
- Independent trustee and advisory
- Wealth solutions
- Estate and succession planning
- Individual and business philanthropy
- Coordination, management and consolidated reporting of assets

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## A structured solution tailored to your needs

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For generations people have used asset holding structures, (trusts, foundations and companies) as an integral part of their estate planning arrangements to achieve a wide variety of goals and objectives. Such structuring remains an essential tool in the armoury of wealth planning advisers around the world.

Managing such structures has always been the backbone of our business and remains at the core of our client services offering. At Opus Private, we have an award winning team of professionals who are leaders in the global wealth planning arena, and who have accumulated a considerable depth of expertise to cater for the needs of our international client base.

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## How we can help

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From the initial planning and formation of a structure through to its administration and management we are able to provide you with a comprehensive range of services that can be tailored to meet specific needs.

These services fall into the following three key categories:

- Provision of professional trustee services
- Corporate management
- Provision of other structures and arrangements

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## Provision of professional trustee services

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Our range of services includes:

- Formation of the trust
- Transfer of assets and interests to a trust
- Arranging custody and management of trust assets
- Routine administration
- Client review meetings
- Production of financial and other client reports
- Periodic reviews for compliance and integrity purposes
- Working with other professional advisers and implementing necessary actions
- Obtaining professional advice where necessary
- Monitoring and appraising asset performance
- Family governance and succession planning
- Briefing beneficiaries and other trust related parties

## Types of trust

The trust concept has been in existence for centuries. The types of trust we establish are predominantly for use by private individuals. Private trusts are usually individually tailored to ensure that they meet the specific needs of the settlor (the person who creates the trust) but, in summary, trusts can be established for the following:

- Private individuals
- A specific purpose
- Charities
- Employees

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## Benefits and uses

A trust is one of the most versatile vehicles through which estate and wealth planning can be achieved. Trusts have many core benefits, including:

- Family governance and planning
- Making provision before and after death
- Confidentiality
- Mitigate international taxes and death duties
- Flexibility – the terms of the trust are capable of change: for example, who benefits, parties involved
- Avoid a premature or forced inheritance or provide for future generations
- Asset protection from third parties
- Acts as a living will – a trust can be easily changed, without formality of a will
- A trust and its administration can be moved to another jurisdiction

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## Corporate management

Corporate entities are widely recognised to be the most common and popular form of wealth holding vehicle available today, and through our global network of specialist providers we can establish companies in numerous jurisdictions. Our services include:

- Company incorporations in all reputable jurisdictions
- Provision of directors and officers
- Company secretarial and statutory records
- Maintain good standing of company
- Routine administration and management, according to client brief
- Control, custody and management of assets
- Ensuring mind and management is correctly maintained as appropriate
- Production of financial and other client reports
- Periodic reviews for compliance and integrity purposes
- Working with professional advisers and implementing necessary actions
- Monitoring and appraising investment performance
- Obtaining local professional advice where necessary

## Benefits and uses

- Internationally recognised and accepted asset-holding entity
- Confidentiality
- Making investments and joint ventures
- Limiting liability
- Mitigation of taxes
- Change situs of property (eg real property onshore, into offshore shares)
- Can be easily sold

## Private trust company

Of particular interest to the international asset-holding family is the use of a private trust company (PTC). In summary its key benefits are:

- Retains family/key client control elements
- Can be corporate trustee of all family trusts
- Family can indirectly control benefits and activities
- Managed from a recognised trust jurisdiction
- Maintains family influence after death of the settlor

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## Other structures and arrangements

Although managing trust and corporate entities represents the core of our structuring services, we can also provide other types of structure. These include:

- Private trust companies
- Limited partnerships
- Foundations
- Employee benefit schemes

The range of services available will depend upon the type of entity required and level of involvement necessary. For a description of our services in relation to other types of structure, please contact us.

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## Location

All structures are managed and administered from Opus Private's office in Guernsey, Channel Islands.

Guernsey is a British Dependent Territory and one of the world's leading offshore financial centres. It has a long history of stability, a modern and sophisticated infrastructure as well as excellent business links to UK, continental Europe and internationally via various European airport hubs. By locating the administration from one central offshore location we are able to ensure consistency in the quality, speed and reliability of our service offering, while preserving the good standing, respectability and integrity of each entity.

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## Regulatory information

The Guernsey Financial Services Commission licenses each of the fiduciary companies within Opus Private under the Island's laws governing the regulation of fiduciaries, administration businesses and company directors.

For further information contact:

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## Professional business insurances

Opus Private carries cover for professional indemnity of directors/officers five times the legal limit required by the regulators in Guernsey.

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## Fees and charges

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Please contact us for full details of our fees and charges and to discuss your requirements.

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## Contact

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For further information, please approach your usual contact at Opus Private, or alternatively:

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