# PRIVATE CLIENT SERVICES

## Your years of hard work have brought you wealth. Now, how do you pass it on to your beloved descendants?

As a high net worth individual and a successful entrepreneur, you may adopt different strategies from time to time to create and continue to build wealth. We understand that nothing brings you more pleasure and satisfaction than seeing your beloved family members reaping the fruits of your dedication and enjoying the wealth that you have passed onto them. Perhaps, now is the time to plan for the future, ensuring that your wealth is better protected and can be passed on to the next generations, in accordance with your personal wishes.

### OUR SERVICES TO PRIVATE CLIENTS

In light of high net worth individuals'unique demands in terms of wealth succession and protection, our extensive knowledge and experience in an international context, and our established team of global professionals, have made us a market leader in providing one-stop, professional, comprehensive, tailor-made, client-interest oriented services for our clients with the highest level of confidentiality guaranteed.

Our international Private Client team capitalises on our extensive international network and works together with your own advisory specialists to deliver the most tax-efficient solution in the region that meets the special needs of you and your family.

Our international network of professional service providers comprises investment bankers, migration experts, trustees, real estate agents and lawyers. Their wealth of experience assures that all your personal and family requirements in wealth succession and protection are met.

Our professionals listen to your wishes, review your wealth position, and draw on our wealth of experience in the provision of asset protection and wealth succession advisory services to design a solution that is tailored to you.  At your request, we can assist you in executing the bespoke solution.

Contact us now to find out more about the services we can offer.

**"Our advisory team is with you – wherever you go and whenever you need us. Our solutions will evolve to satisfy your changing family needs and circumstances at different stages of life, so that you have less to worry about and can focus on the areas that need you more."**

### BDO INTERNATIONAL NETWORK

BDO is one of the largest multinational accounting and advisory organisations in the world. Our worldwide coverage and sizable pool of dedicated and committed professionals ensure a consistent service quality in providing assurance, tax and specialist advice to business owners around the globe.

BDO is a network of independent professional firms, each of whom is a leader at its location, combining local expertise with international outlook and resources. All BDO Member Firms adhere to internationally defined working procedures and quality controls, and the result is a uniform approach and focus worldwide.

## FAQ - WHAT CAN A PRIVATE TRUST BRING YOU?

**Asset protection:** A sound asset protection trust (APT) strategy effectively separates your personal wealth and trusted assets in a way that protects your wealth from undesired claims from your creditors or those associated with matrimonial property, probate or legal inheritance issues.

**Wealth succession:** An APT can smooth out the wealth succession process in accordance with your own wishes, so as to avoid any unnecessary disputes between your beloved family members or the expropriation of your assets by third parties.

**Education fund:** An APT can provide financial support to your dependents, allowing them to receive education at their preferred schools while the fund itself is preserved from being casually spent by the beneficiaries before they are mature enough to manage their wealth. In short, the APT ensures beneficiaries will be financially sufficient.

**Tax benefits:** Under certain circumstances, a carefully executed APT and tax planning can avoid or mitigate tax burdens from inheritance tax, income tax, property transfer tax – to name a few.

## TRUST TAX ADVISORY AND COMPLIANCE SERVICES

BDO International Tax Advisory team advises on tax issues related to trust construction on both regional and global levels. Contact us NOW. All information provided to us is kept strictly confidential.

## OUR SERVICES TO PRIVATE CLIENTS:

### Tax planning

- Migration tax planning
- Personal tax planning
- Investment structure tax advisory
- Tax advisory on corporate re-organization, re-domiciliation, etc.

### Trust set-up and succession planning

- Asset and wealth protection planning
- Trust structure advisory (including settlement of insurance policies and pre-IPO shares into a trust)
- Arranging for trust management and monitoring
- Family wealth succession planning and related arrangements

### Family office services

- Company secretarial services
- Accounting, financial reporting and treasury services
- Managed Payroll and human resources administration and advisory services
- Commercial and banking documentation services
- Tax reporting and compliance services

## OUR CLIENTS

We sincerely offer our quality and professional services to:

- High net worth individual and family
- Family business
- Trusts and foundations
- Lawyers and Professional Advisors
- Banks, credit lending institutions and other financial intermediaries
- Family offices and asset management companies


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