



Trusts and Trustee Services

Trusts are an ancient and highly effective estate planning solution. Used for many centuries in England, they have in more recent decades grown hugely in popularity and are now deployed worldwide to address a multitude of modern day issues that confront multi-jurisdictional families.

Features

- ◆ A trust is legal obligation imposed on trustees and is designed specifically to hold assets and other interests
- ◆ The duties and powers of trustees are established in a trust document created specifically for the purpose
- ◆ Enables individuals to create a succession plan for their cross-border assets with considerable freedom, security, scope and longevity
- ◆ Trusts can hold a wide range of assets, including bank accounts, portfolios, real estate and family companies
- ◆ A trust does not have shareholders, but instead has beneficiaries (usually family members) who are nominated within the trust deed
- ◆ When establishing a trust an individual can reserve powers to suit personal needs
- ◆ Retains accounting books and records, although not for publication

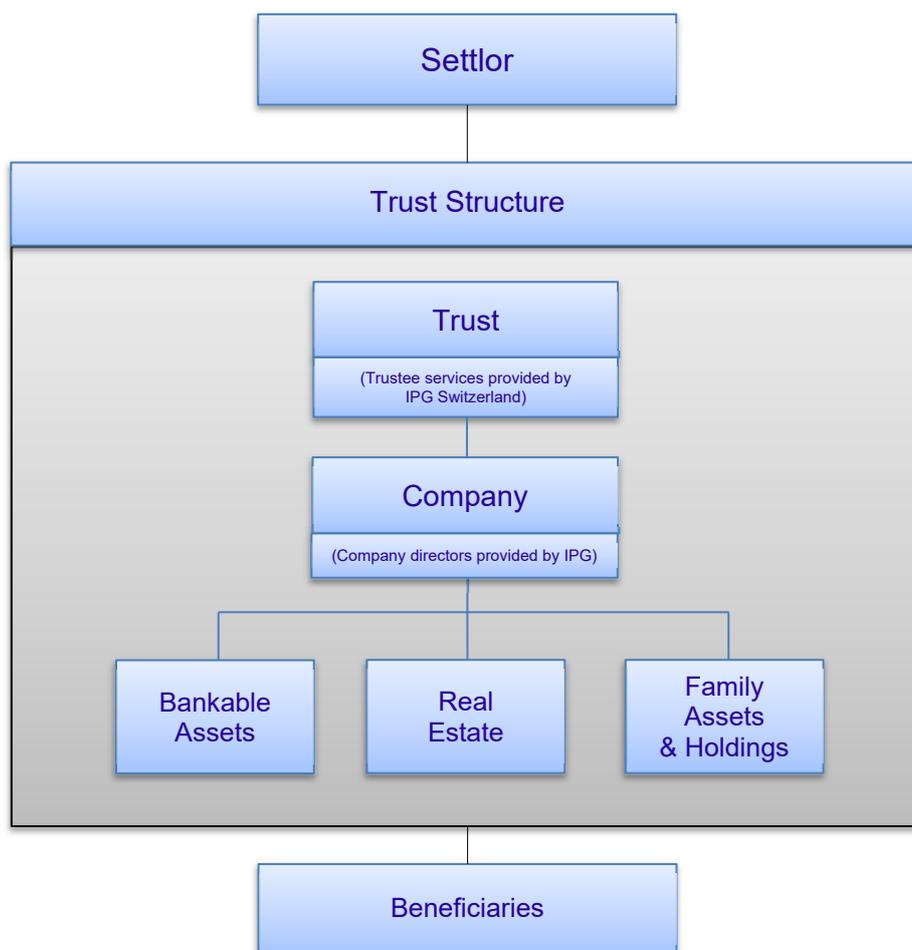
Benefits

- ◆ Used across the world in common law – and increasingly in civil law – countries
- ◆ Trusts are structured to benefit from rigorous asset and inheritance protection laws
- ◆ Trusts can own companies in order to hold further assets or interests
- ◆ Trusts can be transferred to new trustees and even to other jurisdictions
- ◆ Details of beneficiaries or the beneficiaries themselves can be amended or updated at any time during the trust's existence
- ◆ Assets can be added, sold and distributed at any time

Uses

- ◆ Estate planning / providing for heirs
- ◆ Holding bankable assets
- ◆ Holding cross-border assets
- ◆ Asset preservation
- ◆ Preserving confidentiality
- ◆ Philanthropy and charities
- ◆ Tax planning
- ◆ Preserving family wealth
- ◆ Owning family companies
- ◆ Segregation of assets
- ◆ Holding off-balance sheet assets
- ◆ Securing the sanctuary of politically and economically stable jurisdictions

Typical Trust Structure



IPG Switzerland's Services

IPG Switzerland is an estate and inheritance planning consultancy, assisting private clients, their advisors and other professional intermediaries in the structuring of their affairs.

IPG's trustee services are bespoke, client-driven and confidential. From the outset of a new relationship, IPG likes to ensure it has a complete understanding of each person's circumstances and requirements. IPG also prides itself in ensuring that its services are tailored to each person's specific needs.

The IPG team has considerable multi-jurisdictional experience in the global estate and inheritance planning industry. The company and its team are independent of any institution, ruling out potential conflicts of interest.

The IPG Group's services include: Trustee services from Switzerland and New Zealand, Company Management, Foundations, Bahamas Executive Entities, Family Office, Private Trust Companies, Trust Consultancy and Protectorships.

At IPG clients come first.

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