VISTRA

Private Wealth

Helping you create, preserve and transfer wealth

An Introduction to Private Wealth

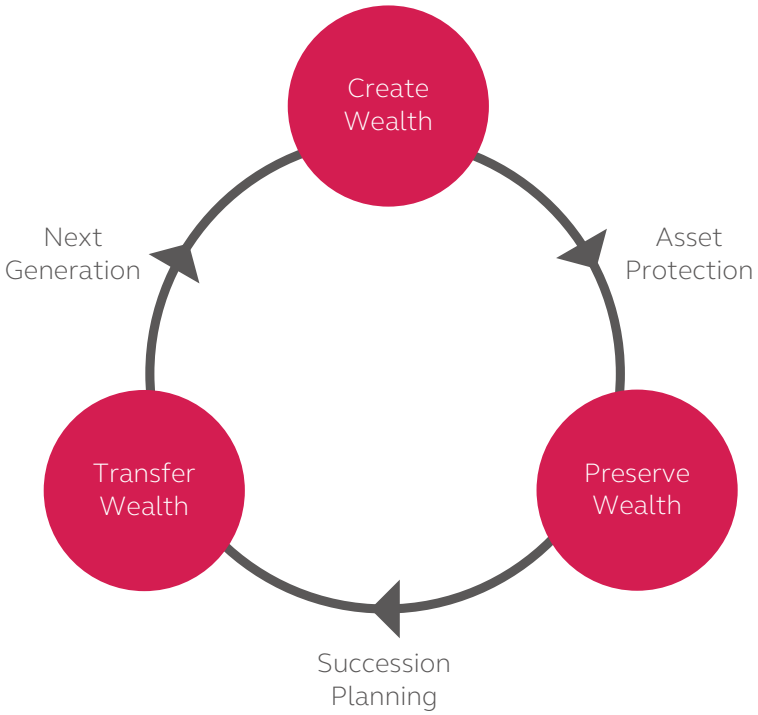
We understand that your personal and family situation is unique and that preserving your wealth for future generations is important to you.

Managing a seamless transition of family wealth from generation to generation can be a daunting task. Crafting a strategic and effective wealth preservation and transition plan will help ensure that the wealth creator's vision becomes a reality for current and future family members.

Our highly experienced wealth structuring and private wealth specialists have professional backgrounds as trusted advisers in private banks, family offices, and trust companies. They provide strategic expertise in helping structure and administer your assets to safeguard your wealth as it transitions between generations.

We are perfectly placed to meet the needs of you and your family. Through our Vistra Private Office platform, the services we offer include succession, business and philanthropic planning using a variety of structures such as family trusts, corporate entities, charitable structures and foundations. Through our global network of offices, we have a comprehensive understanding of local rules and regulations and our international connections are at your disposal.

With deep industry knowledge, Vistra has continued to grow its international footprint and expertise. Whatever you and your family need, wherever you need it, we can help.



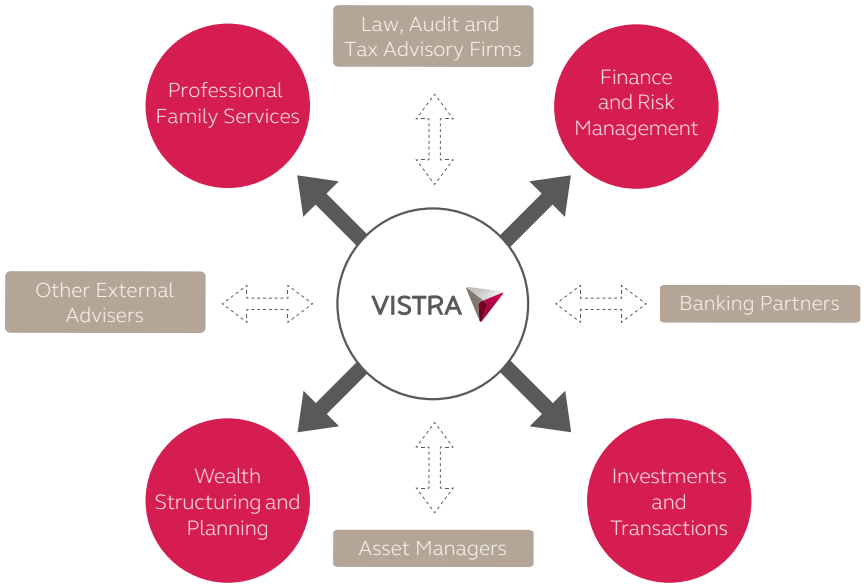
Vistra Private Office

A holistic proposition to support both your private and business affairs seamlessly.

At the core of our Private Wealth services, Vistra Private Office gives you a single point of access to services you would expect from your own family office. These can range, for example, from providing a platform and structure to expand and protect the family's business interest to next generation support, from administering your property portfolio to buying a new yacht.

Our dedicated professionals have diverse backgrounds and skills and understand that wealth and business are usually inextricably linked. They are as comfortable seeking out business partners for a new venture as they are in advising on the most appropriate structure for it.

We work closely with your advisers and avoid duplication. Where necessary, we have access to an extensive network of trusted external partners who we know can deliver the same level of service we do. We act as guardians of your interests, always keeping in the forefront of our approach the fundamental aims of any family enterprise: sustainability, confidentiality, wealth preservation, succession planning and continued prosperity.



Family Business Solutions

The continued success and growth of a business is usually the engine of wealth creation for many clients, be they established multi-generational families or entrepreneurs.

The evolution of entrepreneurial families invariably involves venturing outside the home market. Growth of these enterprises can also act as a platform for the next generation to fulfill their ambitions independently, yet within a supportive environment. Expanding into new markets can be fraught with obstacles and risks, which are not faced in a home country; especially local laws and regulations in employment, commercial activities and the environment. The commercial strategy can be sound but ill-planned execution leads to unnecessary loss of investment and management time.

Our on-the-ground, comprehensive service includes:

- Guidance on local best-practice and navigation through local complexity
- Complete entity set-up, compliance and governance support including Director Services
- Provision of HR policies, drafting of employment contracts and payroll services
- Full bookkeeping, management accounting and reporting as well as preparation of financial statements
- Commercial contract creation, advice and review

Wealth
Succession Planning

If you have substantial assets, you will want to safeguard your wealth now and for the future.

Recognising that all of our clients face differing personal and family business situations, we take the time to understand your individual requirements and aspirations for the future. We coordinate tax and legal advice to ensure existing and new asset structures are relevant and compliant.

Our succession planning solutions include:

- Trusts: discretionary trusts, reserved powers trusts, life interest trusts, charitable trusts, VISTA trusts, and purpose trusts
- Foundations: for charitable, private wealth holding, and business interests
- Private managed companies: for asset holding, residential and commercial properties, artwork and valuables, and private trust companies
- Professional trust protector services
- Ongoing compliance monitoring, administration and accounting support

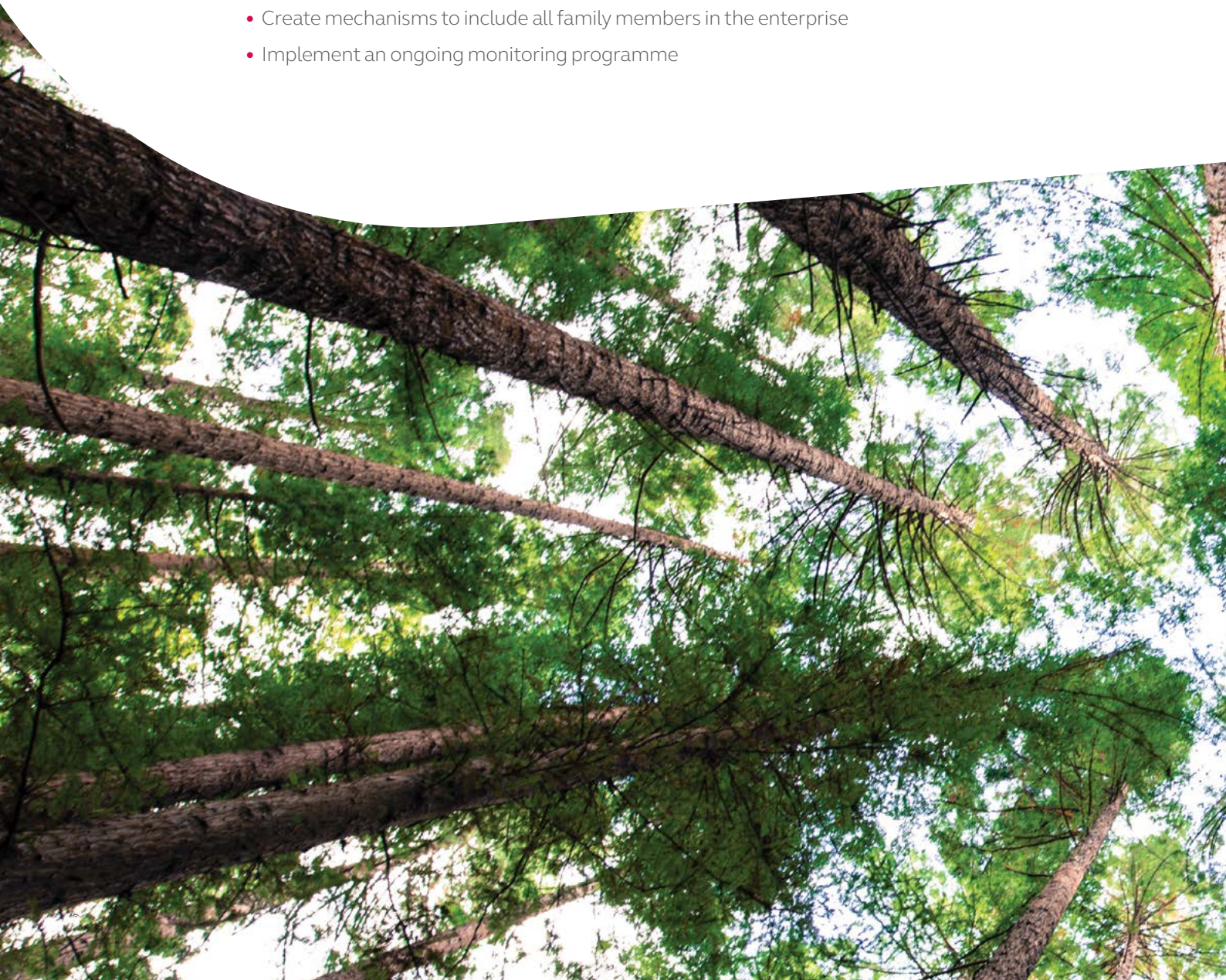
Family Governance

How a family interacts following an inter-generational transfer of wealth will be critical in ensuring its long-term growth and survival.

Families face many new challenges, driven by rapid changes in a globally competitive environment and the spread of family members across countries, each pursuing their own goals and ambitions. Co-operation between family members through an agreed framework will reduce the risk of fragmentation. Maintaining cohesion requires investment in governance: deciding the core values to be adhered to, the key principles which should underpin future strategy and creating a decision-making structure that is agile and proactive, yet allowing all family members a voice. In particular, this includes how best to involve the next generation.

Our experienced specialists can help you:

- Decide on the family's core values and principles driving the purpose of your wealth
- Draft a family charter or constitution in conjunction with family members and advisers
- Ensure principles are embedded within the decision-making frameworks of ownership and succession planning structures
- Create mechanisms to include all family members in the enterprise
- Implement an ongoing monitoring programme



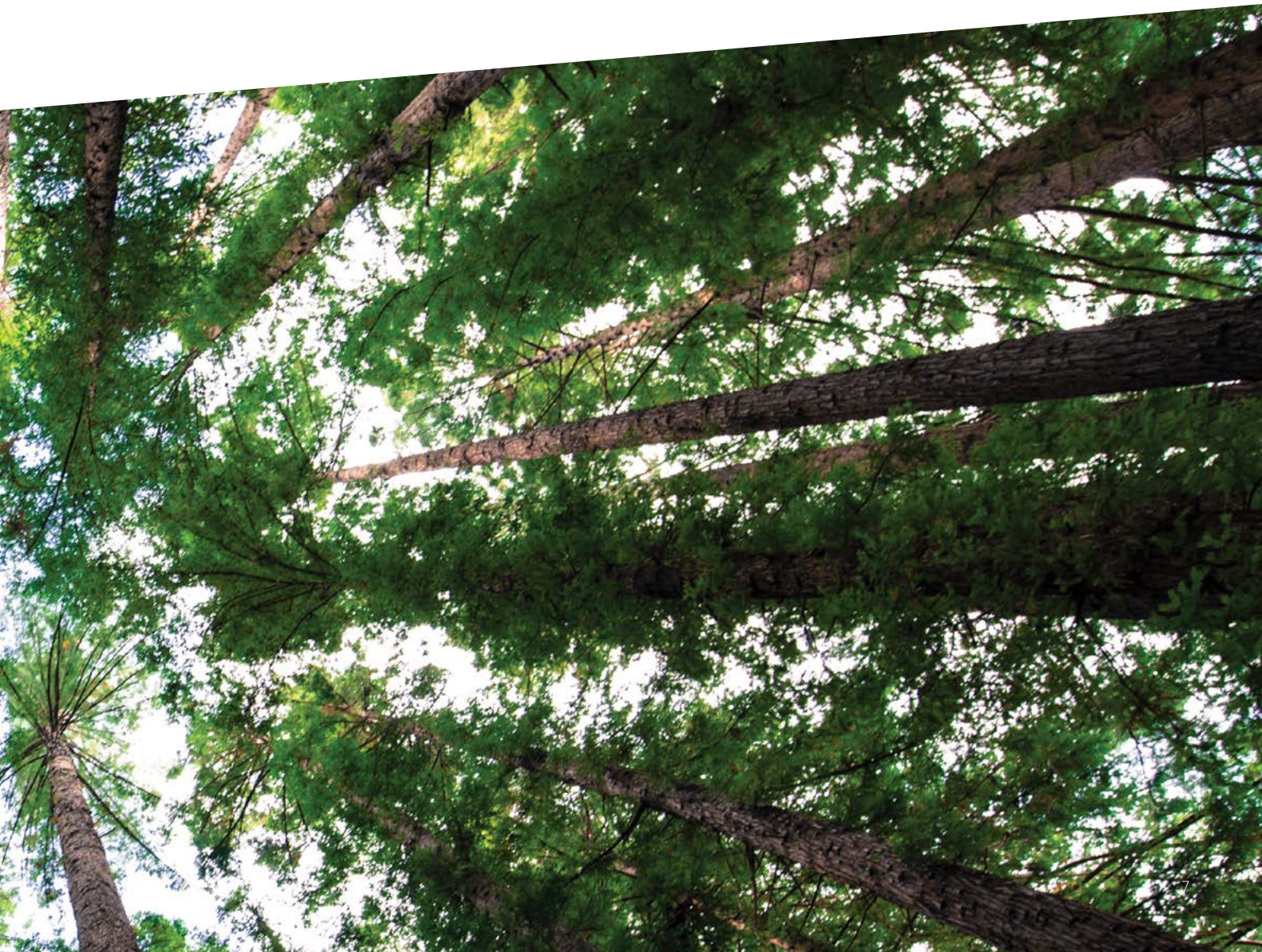
Philanthropy

We recognise that some families would like to make a difference in their lifetime and for generations to come.

Addressing of some of the world's greatest problems can be at the heart of what drives clients who have been fortunate enough to provide adequately for their families and are looking to leave a lasting legacy. Not only do philanthropic initiatives make a practical difference, they can be an excellent way to maintain inter-generational cohesion by addressing contemporary issues that affect all family members.

We support your philanthropic aims by:

- Assisting, in conjunction with your advisers, in the choice of optimal legal and governance structure
- Domiciliation and ongoing management
- Monitoring project performance for financial effectiveness and in meeting objectives
- Regular internal reporting
- Compliance with regulatory requirements



Investments and Transactions

We support clients, in conjunction with advisers, in implementing their investment strategies

Having access to a worldwide network of experienced professionals gives clients an extra source of investment and financing opportunities. Our relationships with a variety of specialist financial advisory boutiques give alternative solutions for clients seeking diversification or exposure to different asset classes.

Our services include:

- Wealth manager selection, investment monitoring and cash management
- Support in finding real estate opportunities in all types of property through our network of brokers and advisers
- Liaising with specialist corporate finance advisory firms for direct investments
- Facilitating access to suitable private equity managers who offer a diverse range of alternative investment strategies
- Access to independent finance and foreign exchange brokers

Liquidity Planning

Planning solutions which provide liquidity can provide a critical role in succession planning for high net worth and ultra high net worth families.

These solutions can preserve the value of the family's estate, ensure funds are available for estate equalisation between beneficiaries, to settle taxes, and other liabilities or to provide long term financial security for your dependents.

Vistra, working with its extensive network of specialists with highly complementary knowledge of succession planning, taxation and the complexity of what's at stake when client's make long term plans, can ensure your peace of mind to provide certainty to meet your wealth protection needs in a cost effective manner and provide continued prosperity for your family.

Our services include:

- Access to an extensive network of specialists
- Co-ordination of planning and execution

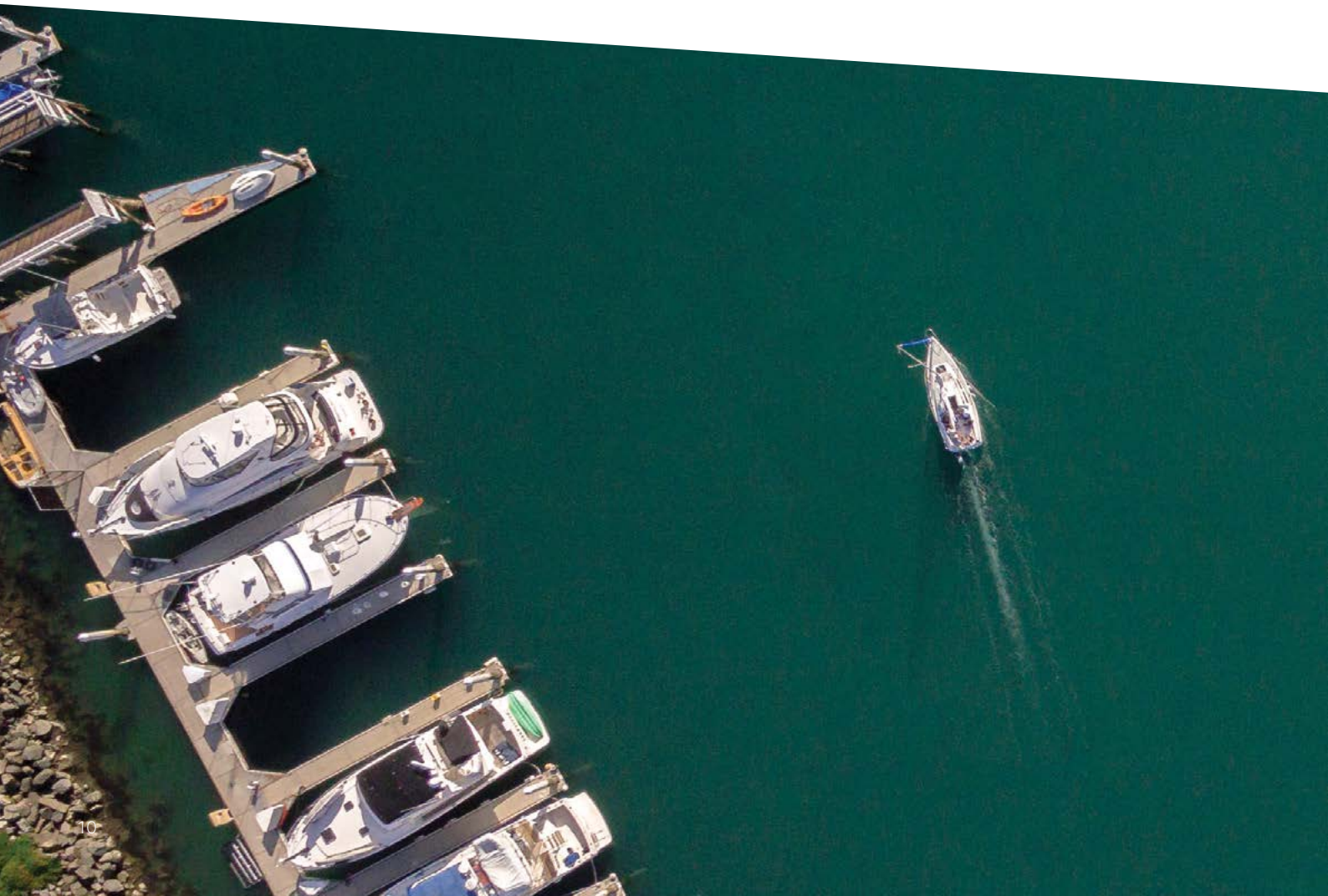
Marine and Aviation

Whether you are looking for guidance on buying and building a new yacht, raising finance, or registering your aircraft, we can help you worldwide.

We assist yacht owners and their representatives, managers, and captains during the lifecycle of a yacht, starting before building or acquisition. We can guide and support our clients and ensure that all legal, fiscal, and operational implications are taken into consideration when making critical decisions.

Our services include:

- Private, corporate and commercial registration
- Specialist company formation, corporate services and administration
- Assistance in tax compliance/structures and VAT planning
- Ongoing yacht and jet financial and operational administration
- Coordination with advisors to assist on sale, purchase and financing
- Crew management and payroll



Residency and Citizenship

You and your family will need a smooth and seamless move abroad, wherever you decide to settle.

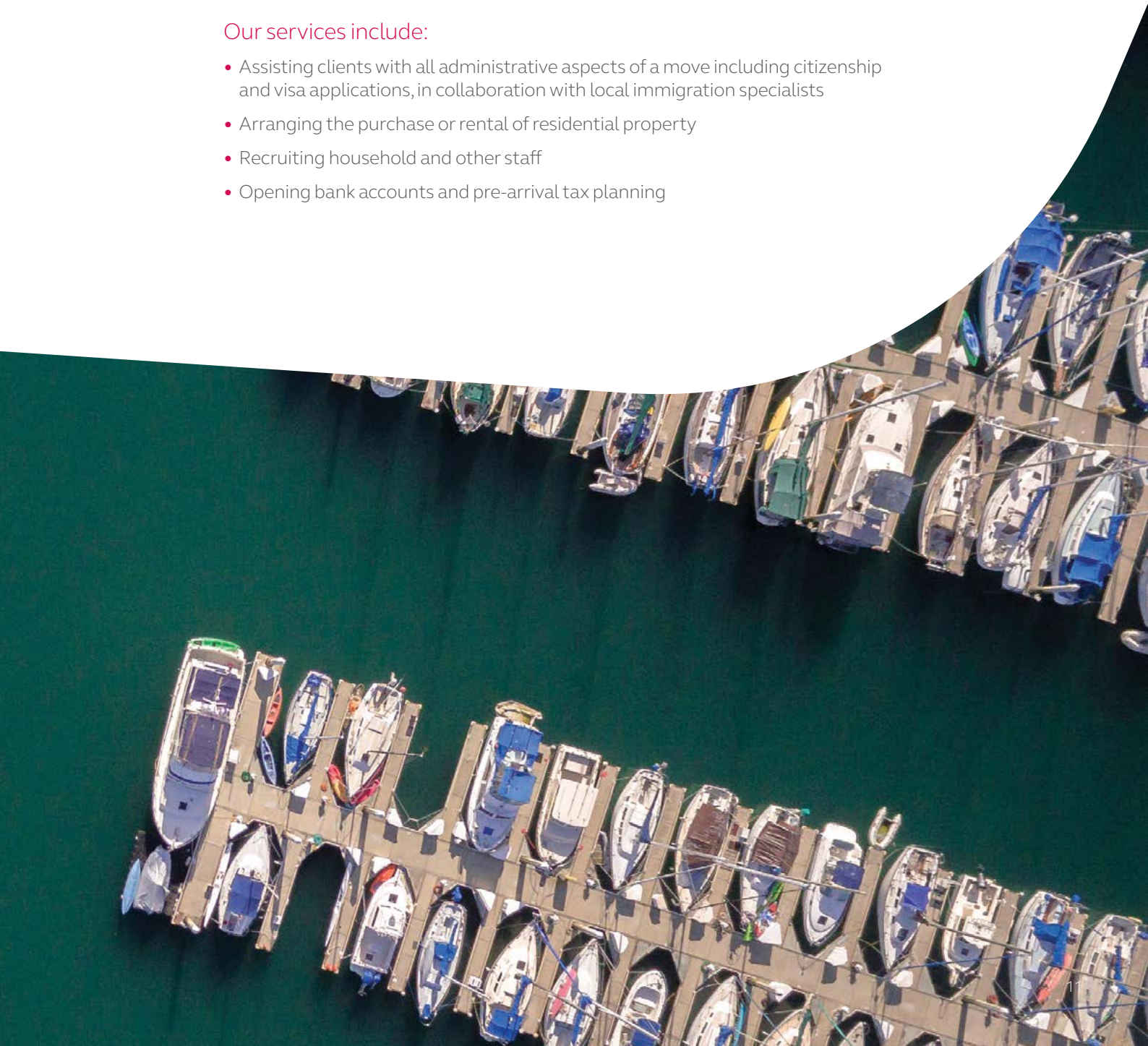
Our international network allows us to support you in all aspects of your move including applying for visas, arranging residential property, and managing the financial aspects of your new residency.

We give guidance on the most suitable jurisdictions that meet your requirements; be it for business, lifestyle or your family's education needs.

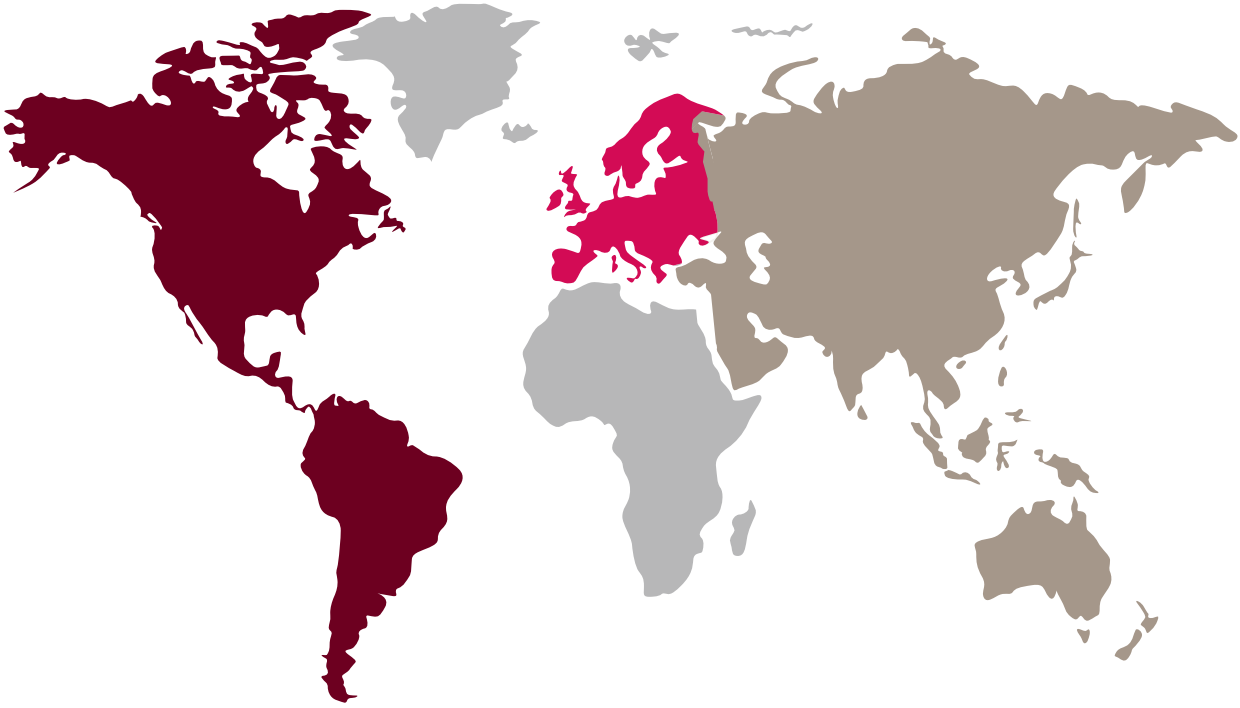
You will have access to advisers with specialist local knowledge of rules and regulations.

Our services include:

- Assisting clients with all administrative aspects of a move including citizenship and visa applications, in collaboration with local immigration specialists
- Arranging the purchase or rental of residential property
- Recruiting household and other staff
- Opening bank accounts and pre-arrival tax planning



Vistra Global Network



Asia-Pacific & Middle East

Australia
China
- Beijing
- Chengdu
- Foshan
- Guangzhou
- Shanghai
- Shenzhen

Hong Kong SAR
India
- Ahmedabad
- Bangalore
- Chennai
- Hyderabad
- Indore
- Kolkata
- Mumbai
- New Delhi

Indonesia
Macau SAR
Malaysia
- Iskandar Puteri
- Kuala Lumpur
- Johor Bahru

Mauritius
New Zealand*
Samoa*
Seychelles
Singapore
Taiwan
United Arab Emirates
- Abu Dhabi
- Dubai

Europe

Austria*
Belgium
- Antwerp
- Brussels

Bulgaria
Cyprus
Czech Republic
Germany
- Berlin
- Cologne
- Frankfurt
- Hamburg
- Munich
- Soest

Guernsey
Hungary
Ireland
- Dublin
- Shannon

Italy
Jersey
Luxembourg
Malta
Netherlands
- Amsterdam
- Eemnes

Poland
- Krakow
- Lublin
- Poznan
- Warsaw
- Wroclaw

Romania
Slovakia
Spain
- Barcelona
- Madrid

Sweden
Switzerland
- Geneva
- Zug
- Zurich

United Kingdom
- Bristol
- Edinburgh
- London
- Reading

Americas

Anguilla*
Aruba*
Bahamas*
Belize*
Brazil
British Virgin Islands
Canada
Cayman Islands
Curaçao
United States
- Bedford
- Boston
- Chicago
- Dallas
- Estero
- New York
- Nevada*^
- San Francisco

*Locations where we have relevant licenses to operate but do not have a physical office.

^In partnership with a local trust company.

About Vistra

Ranked among the top three corporate service providers globally, Vistra is a versatile group of professionals, providing a uniquely broad range of services and solutions. Our capabilities span across international incorporations to trust, fiduciary, private wealth, and fund administration.

We operate across 45 jurisdictions in over 79 cities throughout the Americas, Europe, Middle East, and Asia Pacific, employing over 4,500 professionals.

As a leading global player with expert industry knowledge and location specialists, Vistra has a deep understanding of the professional worlds of our clients, and a proven track record of offering highly versatile solutions, providing the people, processes, and products that help our clients get the most from their international business.

Our Dedicated and Specialised Team

We offer a full suite of services for private clients who seek independent, professional, and confidential services with access to a global network. If you require further information about our Private Wealth services, please do not hesitate in contacting us.

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