Private Wealth

Helping our clients create, preserve and transfer wealth

Opportunity starts here

The acceleration of change in new technology, regulation, and ever-changing markets represent opportunity at every turn. The challenge is to spot it and execute…fast.

This is where we come in.

If you have a clear vision but need a partner to navigate an environment undergoing tremendous change, we can help. We have the insight, skills and expertise to help you unlock opportunity, manage risk and enhance efficiency through our tailored suite of services.

We deliver expert guidance, cutting-edge technology and hands-on support across local jurisdictions to help you maximise your potential. Our technical expertise and extensive experience provide the confidence and clarity that you need. And with unrivalled speed and accuracy, we consistently deliver secure, scalable, resilient and sustainable solutions to help your world run smoothly.

Opportunity unlocked

Our breadth and depth of skills mean that we always find the right solutions for you.

Our deep expertise, combined with our understanding of our clients, means that we always find the right solutions. Our team of highly skilled and experienced professionals can support you in all aspects of the day-to-day handling of your business; from trust & foundation formation, to wealth succession planning, philanthropy and marine and aviation services, we'll deliver the power that you need to focus on your core business activities and succeed globally.

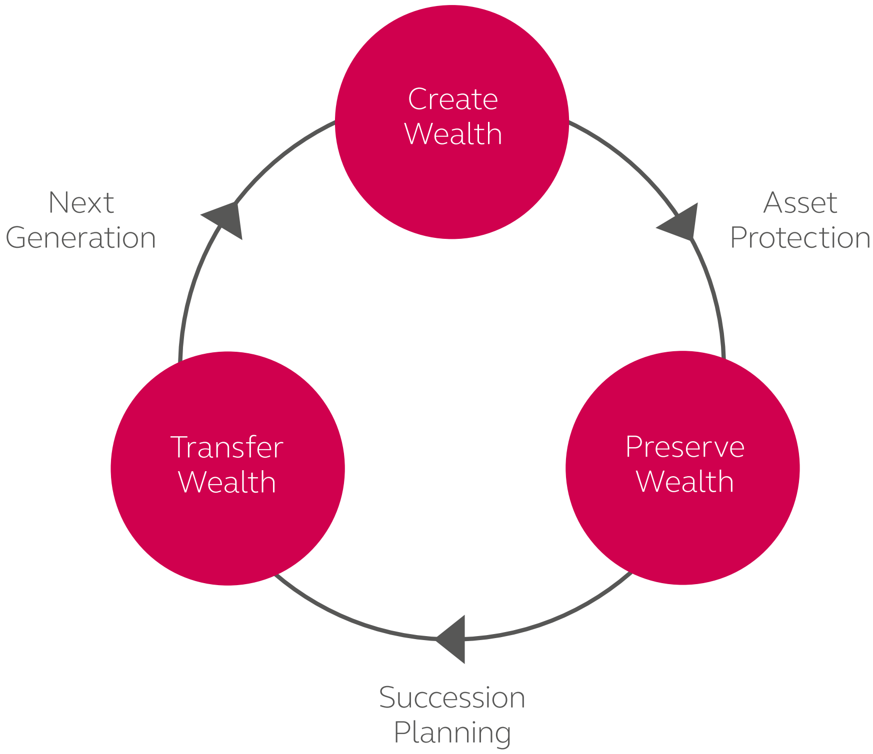
We harness the power and passion of 4,600 dedicated colleagues located in over 80 offices across the Americas, Asia-Pacific, Europe, the Middle East and Africa. Our scale and reach mean that we can connect a global network of experts across speciality sectors to respond rapidly, deliver seamlessly and adapt to changing business dynamics across the globe, and ensure that you stay compliant with every law, regulation and process wherever your business takes you.

In addition, our deep local knowledge and entrepreneurial mindset mean that we get things off the ground fast. We listen, look ahead strategically, and support you over the long term. By combining our global network and outlook with extensive local market knowledge, we can help you make decisions and act with the speed and confidence needed to seize opportunities across the world.

Our expertise in identifying and managing risk gives you the confidence and peace of mind that your interests are always protected; so that you're able to make better decisions, faster. We support a range of clients, large and small, across the Fund, Corporate, Capital Market and Private Wealth sectors, helping capital flow, protecting investors and safeguarding assets across multiple industries

Whatever you're doing, and wherever you want to be, we're here to support you.

Ready? A world of opportunity awaits.



Private Wealth Overview

Managing family businesses in an environment undergoing tremendous change and ensuring the creation, preservation and the seamless transition of family wealth between generations can be an overwhelming task; one that ultimately threatens many family legacies. Decisions and conversations around the most appropriate way to define and leave a lasting legacy can be challenging, emotional and sensitive. This means every family and their circumstances require a private wealth structure as unique and exceptional as the individuals involved, demanding significant time and specialised skills, which most high net worth families simply do not have. But, a lack of communication, professional advice and the inadequate organisation, transition and protection of private wealth risks inter-family conflict inevitably leading to fragmented control of family businesses and the ultimate loss of wealth between generations should the unexpected happen.

At Vistra, it begins with a conversation. Our client's goals, priorities and family dynamics are what matter to us; by understanding their unique needs and concerns, we can offer clients a personalised, flexible wealth structure that evolves with their changing circumstances to ensure that legacies stand the test of time. We also ensure that our personalised structures deliver a defined, tangible purpose for the family's wealth to enrich our client's lifestyle and, often, maximise philanthropic impact. The range of wealth succession solutions we offer is underpinned by an extensive understanding of the complexities of wealth and a proven track-record and reputation for managing the financial needs of entrepreneurs, families, individuals and executives across various asset classes. As a result, our highly experienced advisors can help you achieve financial peace of mind, manage difficult conversations, reduce potential family conflicts and protect and grow assets to create a lasting legacy for current and future generations.

Through our Virtual Private Office platform, we work with a network of advisers to provide effective and durable solutions to sustain legacies by facilitating the successful preservation and transfer of wealth. Our advisors also ensure that the next generation understands the purpose of the family wealth business and can contribute to the wider family enterprise, potentially through investment in their own entrepreneurial ventures or by making a sustainable impact through philanthropy. Our specialists can support you across all aspects of your wealth planning. From personalised wealth structures to the meticulous governance and planning of successful wealth transfer, we are here to support every step of the way.

No matter where our client's businesses take them, we ensure that they will always have financial peace of mind for the principal and future generations. Whatever you need, wherever you need it, we can help. Through our global network of offices, we have a comprehensive understanding of local rules and regulations, and our international connections are at your disposal.

Presence in all prominent **Private Wealth centres**

More than 300 **dedicated Private Wealth staff**

Support clients to manage a combined wealth of over **US$3.5 billion**

Create: A legacy to be proud of

Every client has a unique story behind their wealth and success, with an equally unique plan for their future. We're here to make what our clients have worked for, work for them in the long run by ensuring the continued success and growth of their businesses as the engine of their wealth creation, whether they're an established multi-generational family or an intrepid entrepreneur.

Family business solutions

Secure a legacy that stands the test of time.

Business growth inevitably involves venturing outside the home market, which can be fraught with uncertainty, obstacles and risk - particularly when it comes to local laws and regulations in employment, commercial activities and the environment. Ultimately, individuals and families who execute this expansion poorly risk losing their investment and threaten the business's future. It takes many disciplines in many jurisdictions working seamlessly to expand, rationalise and diversify your business interests and investment portfolio.

No two family businesses are the same – nor are the challenges and pressures that affect them. So, whatever obstacles your business faces, our specialists will provide a selection of services, advice and support tailored to the family's specific needs to ensure continued success and prosperity. We will support your family business with our on-the-ground, comprehensive services to reduce risk, build the business's value and provide peace of mind.

What we deliver:

Guidance

On local best-practice and navigation through local complexities.

Incorporation

Complete entity set-up, compliance and governance support, including director services.

Advisory

Provision of HR policies, drafting of employment contracts and payroll services.

Control

Full bookkeeping, management accounting and reporting as well as preparation of financial statements.

Collaboration

Assistance and review of commercial contracts and financing documentation.

Investments and transactions

Unlock opportunity through investments.

Working in conjunction with our clients and their advisors, we place a relentless focus on their unique objectives for wealth preservation to support their investment decisions so that they can ultimately achieve their investment goals.

Our clients benefit from access to a worldwide network of experienced professionals, offering a range of personalised solutions that provide clients with an additional source of investment and financing opportunities to grow their wealth.

What we deliver:

- Wealth manager selection, investment monitoring and cash management
- Support in finding real estate opportunities 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

“Our clients benefit from access to a worldwide network of experienced professionals, offering a range of personalised solutions”

Preserve: An enduring legacy

The responsibility and opportunity that accompanies substantial wealth calls for prudent expert advice. To preserve wealth for future generations, it is essential to have the appropriate protections in place to safeguard families and businesses from the potential distress, conflict, and financial strain should the unexpected happen.

We provide specialist guidance and a range of services to help protect wealth now and for the future. By reviewing our client's overall situation and working with them to understand their wealth's purpose, we can implement tailored strategies to secure an enduring legacy that achieves individual and family goals.

Wealth succession planning

Protect and preserve private wealth beyond lifetimes.

Succession is inevitable, and although it can be complex and sensitive to address, planning for change is integral for success. Wealth succession planning should be a critical part of any family's financial strategy to ensure that assets go to the right people at the right time. Every family situation is unique, and so the way they approach their succession planning should be equally as unique. This is why we'll take the time to understand the complexities of your financial situation and tailor a plan that is adaptable and bespoke to your family's needs. We will also work with you to build the tax and legal safeguards to provide financial peace of mind knowing that the wealth continues to benefit future generations.

What we deliver:

Trusts

Discretionary trusts, reserved powers trusts, life interest trusts, charitable trusts, VISTA trusts, STAR trusts and purpose trusts.

Foundations

For charitable, private wealth holding, and business interests.

SPVs

Privately managed companies: for asset holding, residential and commercial properties, artwork and valuables, and private trust companies.

Protection

Professional trust protector services.

Management

Ongoing compliance monitoring, administration, and accounting support

Liquidity planning

Provide long-term financial security for dependents.

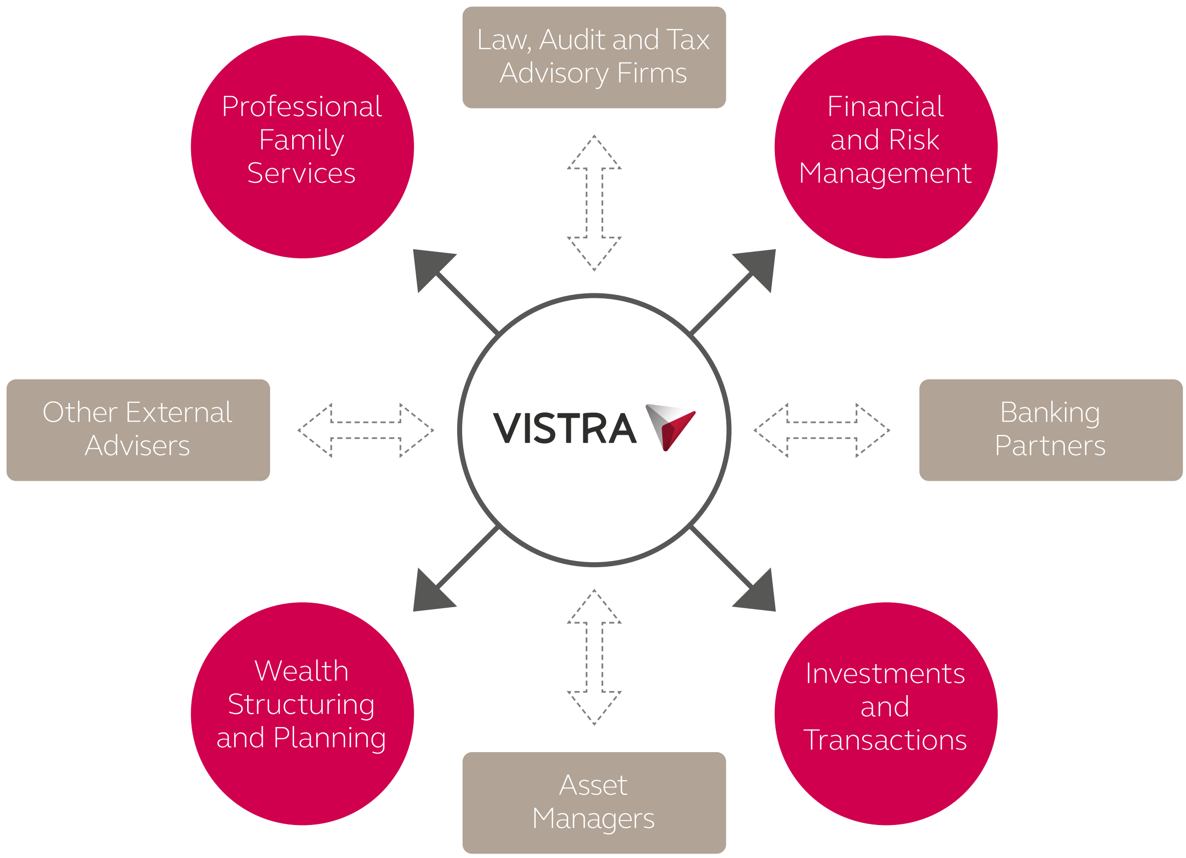
Expertly designed liquidity planning is a critical consideration to enhance the efficacy and flexibility of any legacy plan. Solutions that provide liquidity can preserve the value of family estates, ensure funds are available for estate equalisation between beneficiaries, settle taxes and other liabilities or provide long-term financial security for dependents. We work closely with trusted counterparties to tailor solutions that can offer the liquidity necessary to protect and preserve your wealth and ensures that it is administered and distributed in line with the agreed wishes of the principal.

We recognise the complexity of planning beyond your lifetime, so we work with an extensive network of specialists who have a highly complementary knowledge of succession planning, taxation and the complexity of what's at stake when you make long-term plans. Working together, we can ensure peace of mind and deliver certainty when it comes to meeting your wealth protection needs. As experts in the coordination, planning and execution of a cost-effective liquidity strategy, we can provide continued prosperity for your family.

Transfer: Protecting intergenerational wealth

There's more to private wealth transfer than merely passing on your assets. The successful transfer of wealth between generations requires careful planning and meticulous governance. It also means bringing the whole family with you. But, when it comes to family conversations centred around wealth succession, this can be charged by emotion and complicated family dynamics that need to be navigated sensitively.

Our Private Wealth team has the extensive expertise and experience working with multi-generational, internationally diverse families needed to help clients seamlessly navigate personal and complex decisions and define the protocols through which the core family wealth is sustained as a lasting legacy.



Family governance

Sustaining family unity as well as prosperity.

A robust but adaptable governance framework is vital for sustaining wealth in families through successive generations by establishing proper processes to manage the assets. This becomes particularly pertinent as family members naturally tend to pursue their own goals and ambitions, often spreading across the world and potentially fragmenting the control and sense of loyalty to the family assets.

Together, we can help your wealth survive successive generations and avoid conflicts by identifying the family's core values that should underpin future strategy and creating a decision-making structure that's agile and proactive yet gives all family members a voice. So, no matter the challenges that future generations face, there's a coherent plan for sustaining multi-generational family unity and prosperity through a shared vision for the continuity of wealth, values and businesses.

What we deliver:

Guidance

Support deciding what core values and principles drive the purpose of your wealth.

Advisory

Drafting a family charter or constitution in conjunction with family members and advisers.

Oversight

Ensuring principles are embedded within the decision-making frameworks of ownership and succession-planning structures.

Unity

Creating mechanisms to include all family members in the enterprise.

Control

Implementation of an ongoing monitoring programme.

Philanthropy

Transform passions into a lasting legacy for society.

Philanthropy means different things to different people, reflecting the various aspirations and backgrounds of individuals and families who wish to use their wealth to make a difference, both in their lifetime and for future generations to come. Not only do philanthropic initiatives make a practical difference, but they can also be an excellent way to create a lasting legacy and maintain inter-generational cohesion by tackling contemporary issues that affect all family members.

We understand that philanthropy is often fuelled by individual passions, crucial to personal growth and that of your family. A strategic process with meticulously researched, planned and directed activities built around the issues you feel strongly about is likely to achieve significantly more impact for chosen causes. With that in mind, our specialists will work with you and your family to guide the development of philanthropy, from initial vision and planning to the implementation and ongoing management of the philanthropic efforts.

Vistra's Virtual Private Office

At the core of our Private Wealth services, our Virtual Private Office platform provides our clients with a single point of access to the services you would expect from a private family office. These can range, for example, from setting up a succession planning structure to next-generation support, from administering property portfolios to purchasing and chartering a new yacht. Our dedicated, highly experienced team of internationally connected professionals provide expert guidance and a range of services to help clients protect wealth now and for the future. We will work with clients and their advisers to reach individual and family goals.

Where necessary, we have access to an extensive network of trusted external partners whom we know can deliver the same level of service that we do. We act as guardians of our client's interests, always keeping the fundamental aims of any family enterprise at the forefront of our approach: sustainability, confidentiality, wealth preservation, succession planning and continued prosperity.

Private Wealth: Our key service list

Governance, Risk & Compliance

- Trust and foundation formation
- Corporate Income Tax Returns
- Indirect Tax Returns
- Financial Statements & Reporting
- Enhanced Due Diligence
- Legal Entities Formation
- Financial Statements & Reporting
- Special Purpose Vehicles
- Fund Formation
- Directorship Services
- Company Secretarial
- FATCA & CRS Reporting

Finance, Accounting & Administration

- Trust & Foundation Accounting
- Management Accounting
- Company Bookkeeping
- Payroll

Advisory & Transaction Support

- Family Business Management
- Investments & Transactions
- Business Contracts
- International HR
- Managed HR Services
- Wealth Succession Planning
- Marine & Aviation
- Residency & Citizenship
- Family Governance
- Philanthropy
- Liquidity Planning

A team you can rely on

Globally Alert and Locally Alive. We are your trusted partner for the long-term *wherever* and *whenever* you need us. Our high performance, high values culture ensures that we work as a One Vistra team to bring you the right mix of industry, technical, and local expertise. Together, we listen, we partner. We harness the power and passion of our organisation for your benefit. We are excited about your future and relish the challenge of helping you **Unlock Opportunity**.

Committing to clients

We listen, take ownership and think ahead, because client success is our success.

Empowering people

We unlock the unique capabilities of our people – providing opportunities and helping them thrive.

Working as ONE VISTRA

We are stronger together, delivering solutions with the power of our combined skills.

Doing the right thing

It guides every decision we make, every day.

About Vistra

At Vistra, we believe your business and your people can make a difference in the world. That's why our work is focused on helping our clients act with confidence and speed to seize opportunity wherever it arises. As a global corporate service provider and fund administrator with more than 5,000 professionals in over 45 jurisdictions, we empower legal entities globally to work smarter, grow faster, act responsibly, protect capital and scale across borders – by doing what we do best: reducing risk and enhancing efficiency. Discover how we can help you and your business seize opportunity today by exploring our services at vistra.com

Talk to an expert

Please get in touch for more information or if you think this is something we can help your business with.

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Seize opportunity

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