

**TRUSTMOORE**

**PRIVATE WEALTH  
SOLUTIONS**



## PRIVATE WEALTH SOLUTIONS



**As an experienced Private Wealth Solutions (PWS) provider, we understand that every family office setup is as unique as each family. Our tailored services are designed to suit your specific needs.**

These include core family office services, supplemented by specialized external services based on your requirements and delivered in our generalist approach. This approach eliminates potential conflicts of interests, maximizes quality, and reduces regulatory challenges.

Trustmoore continues to enjoy substantial organic growth while remaining wholly owned by our founders and management. We are a unique, independent corporate service provider - unbiased, unaffiliated to any product, and completely independent of any bank, lawyer, or audit firm. This allows us to remain fully focused on your needs and success.

“Obtain unbiased advice from Trustmoore, a fully independent advisor”

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# WEALTH MANAGEMENT

Families often face difficult questions related to the management of their wealth, such as:

- How can our wealth be preserved and expanded?
- What are the individual wealth objectives (as part of a family)?
- How do I choose partners to manage my wealth?
- How should our wealth be invested?
- What is a suitable structure for us?
- How can I obtain a clear overview of all assets?

We can provide answers, helping families determine the strategic asset allocation of their wealth, decide on investment policies and, consequently, asset and fund manager selection, and advise on the most efficient and effective legal structure for meeting wealth management goals.

We do not act as an asset manager or as an investment advisor. Instead, we monitor and report on our clients' wealth, assisting them in finding the right banks or asset managers. Owing to our current client base and the fund services we provide in several countries, we have an extensive network of banks, fund managers and asset managers in all major asset classes. We create your investment strategy aligning with your goals, values and objectives. Subsequently, regularly, we contact your asset managers and banks to ensure that their strategies align with your needs. We can pitch for others to step in, in case of underperformance or whenever needed.



Transparent, effective, and efficient accounting and thorough reporting of family assets are essential elements of successful wealth management. Our tools generate clear and comprehensive consolidated asset reports, providing clients with an accessible, periodic wealth overview. In addition to reporting, we actively monitor and analyze asset manager performance, proactively engaging them directly to discuss their performance and tactical decisions (both implemented and planned). Our effective accounting systems ensure that performance can be adequately analyzed, portfolios comply with investment guidelines, and relevant information is available for proper tax assessment.



## **LEGAL STRUCTURE**

We maintain legal structures that are based on your specific needs. In many key jurisdictions, we are a licensed and supervised fiduciary service provider and can act as directors, board members, and trustees of family owned entities and trusts. In our formal role, we provide core private wealth solutions, ensuring that entities and trusts maintain requisite financial accounts and always comply with local (tax) laws and regulations. The combination of our wealth management and fiduciary services ensures that investment approach and management are sited securely in the formal decision making bodies of the investment entities.

## **LEGAL AND TAX NEEDS**

Our lawyers can review or draft legal documentation. They work alongside our private wealth experts, who are intuitive in situations where thorny legal or tax issues could arise. Should these specific legal or tax related topics become relevant, we also use an extensive network of external specialists to ensure that the highest level of service is provided. We believe that engaging external experts for such matters is more cost efficient and more effective, given their extensive and varied experience in the field.

## **FAMILY GOVERNANCE**

Family governance is a structured process for educating and facilitating communication and decision making between family members. An effective family governance structure safeguards stability within a family. It promotes healthy relationships between family members and ensures they are committed to the stewardship of family assets, speaking with a single voice towards businesses and advisors. The family governance setup strongly depends on the family's size and structure.

We have extensive experience with family governance issues and can assist in setting up a governance model, guiding families through the implementation of governance processes. We can also manage family meetings, ensuring they are productive and adequately documented.

# CONTACT US FOR FURTHER INFORMATION

Based in leading financial centers around the globe, we deliver high quality corporate services in a noncorporate way.



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