

Private
Clients

Introduction

Today's business environment continues to grow both in value and geography; providing a wealth of opportunities for success. However managing success can sometimes be a daunting task if the correct guidance is not available.

Vistra's Private Client's team are experts at managing a seamless transition of family wealth and can create tailor made solutions to fit each particular situation. Clients are our top priority; we recognise that families who continue to succeed financially need our support so that they can make a difference, not only in their lifetime, but also for generations to come.

With deep foundations in the industry, Vistra's Private Clients has continued to grow its international footprint and expertise. Whatever you and your family need, wherever you need it, we can help.

About Vistra

Ranked among the top four 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 client services, and fund administration services.

We employ over 3,500 professionals in 44 jurisdictions throughout the Americas, Europe, Middle East, and Asia Pacific.

As a leading global player with expert industry knowledge in each jurisdiction, 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 and personal wealth.



Private Clients Services

We understand that your personal and family business situation is unique and that its preservation 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 solid wealth 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 client 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. The services we offer include private office, estate, philanthropic, business, and succession planning using a variety of structures such as charities, corporate entities, family trusts, 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.



Vistra Private Office

A dedicated team that can support both your private and business affairs seamlessly.

As part of our Private Clients 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 education advisory to next generation support, from managing your properties 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 external specialist providers 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 concern: growth, wealth preservation, and efficient succession planning for the next generation.



Structuring and Asset Protection

If you have substantial assets, you 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. Following these detailed discussions, we create tailored structures that suit your individual circumstances and provide ongoing management, domiciliation, company secretarial, and accounting support.

Our estate planning solutions include:

- Coordinating tax and legal advice on new and existing asset structures
- 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



Relocation & Residence

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

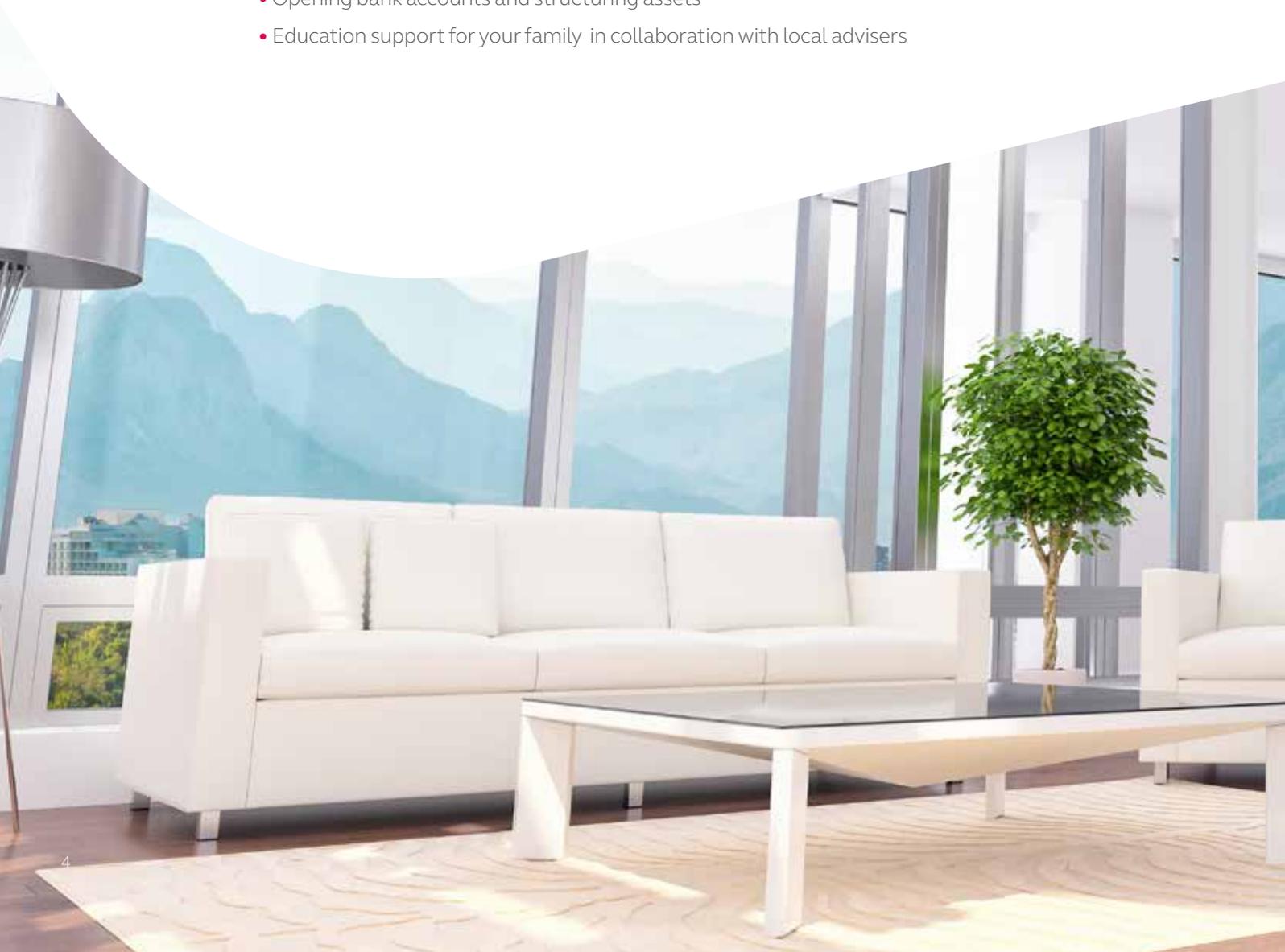
Our international network allows us to support you in all aspects of your move including applying for visas, arranging residential property, and managing the financial aspects of your new residency.

We have successfully relocated families to many destinations including London, Hong Kong, Singapore, Switzerland, Dubai, Malta, Cyprus, Monaco, and Spain.

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 applications, in collaboration with local immigration specialists
- Arranging the purchase or rental of residential property
- Recruiting household and other staff
- Opening bank accounts and structuring assets
- Education support for your family in collaboration with local advisers



Charities

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

If you have an interest in philanthropy, we can ensure your donations are structured in a tax-efficient way. We assist our clients not only in the structuring of individual donations, but also in the establishment and management of dedicated charitable foundations and trusts.

We support charitable foundations with domiciliation, account management, project monitoring, regular reporting, and compliance with regulatory requirements.



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 whole lifecycle of a yacht, starting before building or acquisition. Our aviation expertise allows us to provide owners and operators with a comprehensive end-to-end service wherever they are based. 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/commercial registration
- Specialist company formation, corporate services, and administration
- Assistance in tax compliance/structures and VAT planning
- Ongoing yacht and jet administration
- Coordination with advisors to assist on sale/purchase
- Crew management and payroll
- Assistance with financing and leasing



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 Clients services, please do not hesitate in contacting us.



Jonathon Clifton
Regional Managing Director,
Asia & Middle East
T +852 2848 0188 jonathon.clifton@vistra.com

Vistra Hong Kong



Christine Tan
Managing Director, Trust Services Asia,
Corporate & Private Clients
T +65 6854 8061 christine.tan@vistra.com

Vistra Singapore



Anthony Galea
Managing Director, Marine & Aviation
T +356 22 586 427 anthony.galea@vistra.com

Vistra Malta



Chris Burton
Managing Director
T +65 6854 8010 chris.burton@vistra.com

Vistra Singapore



David Rudge
Managing Director, Corporate & Private Clients UK
T +44 20 3872 7334 david.rudge@vistra.com

Vistra UK



Jane Pearce
Managing Director
T +44 1534 504730 jane.pearce@vistra.com

Vistra Jersey



Sascha Züger
Managing Director
T +41 44 296 68 70 sascha.zueger@vistra.com

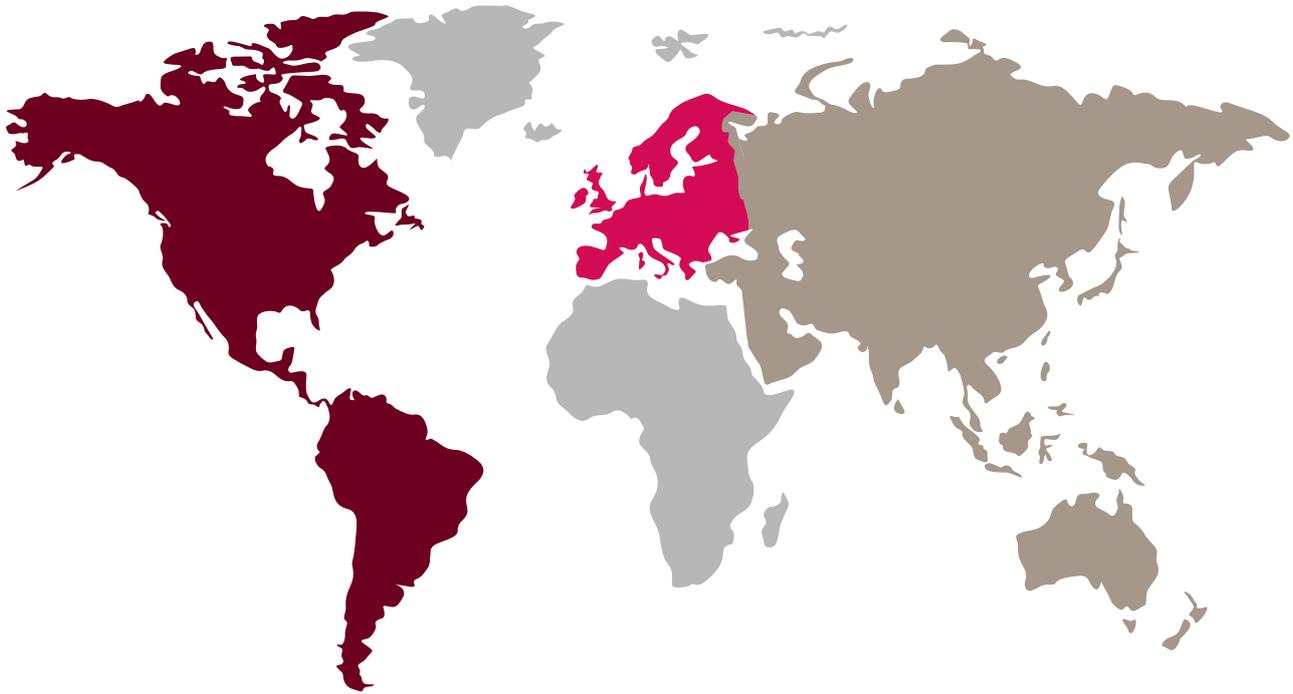
Vistra Zurich



Walter Stresemann
Managing Director
T +41 22 319 18 94 walter.stresemann@vistra.com

Vistra Geneva

Vistra Global Network



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Vistra
19/F, Lee Garden One
33 Hysan Avenue
Causeway Bay, Hong Kong
Tel +852 2521 3661
Fax +852 2845 9198

www.vistra.com [linkedin.com/company/vistra](https://www.linkedin.com/company/vistra) twitter.com/vistragroup

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