



When you work hard all your life to ensure a comfortable retirement and legacy for your family, you want your effort to be worthwhile.

Leaving 'Estate Planning' for another day?

- You could be leaving a headache and not the legacy you'd hoped your family would enjoy.

Do your children live away from Jersey?

- Inheritance rules and taxes can be managed effectively to maximise wealth transfer and retention.

Do your loved ones have the 'know-how' to manage your wealth?

- Your spouse/partner may not be comfortable or minded to take control.

Will an inheritance hinder the drive and ambition of your children?

- Timing discussions and involvement of children can be a crucial part of wealth transition planning.

We work alongside Jersey families who have had similar thoughts /concerns and have benefitted from the support we can provide in a number of areas.

From low cost traditional Will Trusts, to more in-depth family wealth guidance, inter-generational wealth transfer planning and family governance support, we provide individually tailored services for our clients' structures and their unique circumstances.

Locally owned and managed, we have a depth of experience in supporting local clients on these matters and fully appreciate the sensitivities of the topic.

ANTICIPATED OUTCOMES & BENEFITS

Comfort in legacy management
Professionally Managed and Timed Wealth Transition

Familiarity with family affairs by experienced professionals
Effective Family Governance

Effective Estate management
Family Assets Protection

Clarity of circumstances and available options
Flexibility of Structuring and Services

Contact our experienced trustees for guidance about taking the next steps.

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