IQEQ

Know how Know you

Private Wealth Services

Know how

You need a service provider with the scale to master complex requirements across diverse jurisdictions.

We have the know how to keep on top of legislation and regulations and the resources to act fast. We use cutting-edge technology and robust processes to provide the best service. Our in-house training programme constantly develops our teams' knowledge and skills. Whatever you want to achieve, we have the know how to deliver it.

Know you

The private wealth world is based on trust and personal relationships that are built up over years. Clients like having a single contact they know who also knows them.

We have this know you talent. We assign a dedicated client director to you who will remain your main point of contact throughout your relationship with us. Our people have the ability to anticipate and understand your needs. Whatever you want to achieve, we have the know you to make it happen.

Global scale. Personal connection.

Welcome to IQ-EQ, the next word in private wealth services.

The private wealth world has changed. Increasing globalisation has led to greater complexity but you and your family still need the same simple thing – peace of mind.

You need to feel confident that your assets, both personal and business, are protected, safeguarding your investments now and for the next generation of your family. Moreover, you need to know that the structure being used is fully compliant.

Providing that reassurance requires scale and depth of knowledge. Our experienced professionals have that expertise and the motivation to deliver the highest standards of corporate governance. They have the skills and tools to support you and your advisers in implementing your private wealth strategy.

Service range and an extensive skillset are essential, but personal service has never been more important. We know that personal connection is vital. That's why we invest so much in our people's personal and professional development. You, and your family, are in safe hands.

Key facts and figures

People worldwide	Worldwide locations	Assets under administration	Minimum senior team experience
2450+	23	$400+bn	10yrs

Our expertise

- Asset protection
- Succession planning
- Family office support
- Philanthropy
- Luxury assets
- Alternative assets
- Commercial assets
- Private funds

Individual needs. Tailored services.

You could be a family patriarch or matriarch, a senior member of a multi-generational family, a serial entrepreneur, an owner of a multinational family business, an investor in private capital – or any number of these. We understand that your requirements are as individual and varied as your interests. So we take the time to listen to you and your advisers and shape our services around your needs and those of your family.

We provide those services at every stage of your wealth planning and management strategy, including corporate and private fund administration and support.

- Companies
- Foundations
- Funds
- Managed trust companies
- Private trust companies
- Securitisation vehicles
- Standard trusts

- Corporate secretarial
- Dissolution/liquidation
- Domiciliation
- Escrow
- Financial accounting and reporting
- Fund administration
- Nominee shareholding
- Outsourced business solutions
- Tax compliance

- Directors
- Foundation council members
- Protectors
- Trustees

Structure establishment

When you establish an entity, it needs to meet your requirements. Our expert teams work with you and your advisers to ensure your needs are met.

Qualified professionals

Engaging professionals for your structures brings with it peace of mind. Our people are qualified trust and estate practitioners, accountants, lawyers and chartered secretaries.

Administration services

Our role is to manage the day to day administration of your structures. Our experienced teams provide a range of administration and accounting services within a robust corporate governance framework.

Broad expertise. High touch.

Succession planning

Succession planning is important to you. You've worked hard to accumulate, preserve and grow your wealth and you want your family to continue that tradition across successive generations. We work with you and your advisers to ensure that the transfer is not only effective and efficient but also the best fit for your successors and the future needs of their families.

Asset protection

Protecting your assets is fundamental to managing your wealth. That means mitigating the risks of political expropriation, claims from a former spouse or related family member or legal action arising from a high risk occupation, among other threats. Your asset protection structures need to be put in place early to guard against any future liability, not when the liability has occurred or is expected to occur. We implement and manage those structures for you.

Family office support

A family office is often a consideration when your family spans multiple generations and your assets and investments span multiple jurisdictions and multiple structures. In such cases, the broad range of activities undertaken by your family office can require a range of professional services. As an independent provider with a global network of offices, we are ideally placed to provide your family office with that support.

Philanthropy

Sharing your wealth outside of your family leaves a lasting legacy when managed effectively. When your objective is sustainable, high-impact philanthropy you require sophisticated structures and strong governance. You want to make a positive social or environmental impact by investing in a company, organisation, charity or fund. You want your investment to make a financial return that can be reinvested for the long term. We help you achieve that goal.

Wise decisions. Strong growth.

Luxury assets

Your interest in owning a yacht, aircraft or classic car may be to fulfil a personal passion, expand your investment portfolio or meet a business need. Whatever your motivation, the implementation of ownership structures for these luxury assets should benefit you and your family. We understand the need to balance your personal and professional interests and tailor our services accordingly.

Alternative assets

Diversifying your risk can mean diversifying your assets. The well-established alternative asset classes of real estate and private equity are common long-term investment choices. Whatever your motivation, we use our experience for your benefit.

Commercial assets

Your want your family business to grow and prosper. As your commercial assets increase, so do the complexities of managing the operating businesses holding those assets. You may be looking to enter new markets via a joint venture, diversify your investment interests or list one or a group of your companies. We support your business requirements at all stages of the corporate lifecycle.

Private funds

As a sophisticated investor, you're looking for investment flexibility. Private investment funds offer that flexibility as part of a small group of like-minded investors, whether that's family, friends or a club deal. We have the experience, technology and expertise to handle different asset classes, portfolios, fund structures and investor demands. So whatever choice you make, we can help.

Deep thinkers

Knowledge pool

You need to know that we understand your personal and professional requirements. With decades of industry experience among our senior client directors, we have the expertise at hand to anticipate and meet your requirements.

Safe environment

You need to know that your information is secure with us. We have security systems and processes to protect your information and are committed to your privacy. We continually invest in those systems and processes to keep us at the forefront of data and cybersecurity.

Regulatory support

You need to know that we understand the significance of compliance. Our professionals have the expertise to effectively support you and your advisers as you navigate the international regulatory landscape.

"Professional. Fully aware of their responsibilities." [1]

[1] Client Research Programme, December 2017

Our people

You need to know that our people are ahead of the curve. To build their expertise, and keep it up to date, we have our own in-house experiential training programme open to people at all levels of the organisation.

Lasting relationships

You need to know that we care about you and your family. We know that lasting client relationships are based on having a trusted, single point of contact: one that knows you, and your specific requirements. As your needs change, we may bring in additional expertise from within our network but your main contact remains the same. That remains true whether we work with you and your advisers in one or multiple jurisdictions.

"It's not a faceless administration, it feels like an extension of the family office." [1]

Safe hands

Key contacts

If you would like to speak to us about supporting you and your advisers in implementing your private wealth strategy, contact one of the team. We're always ready to listen.

Craig Brown
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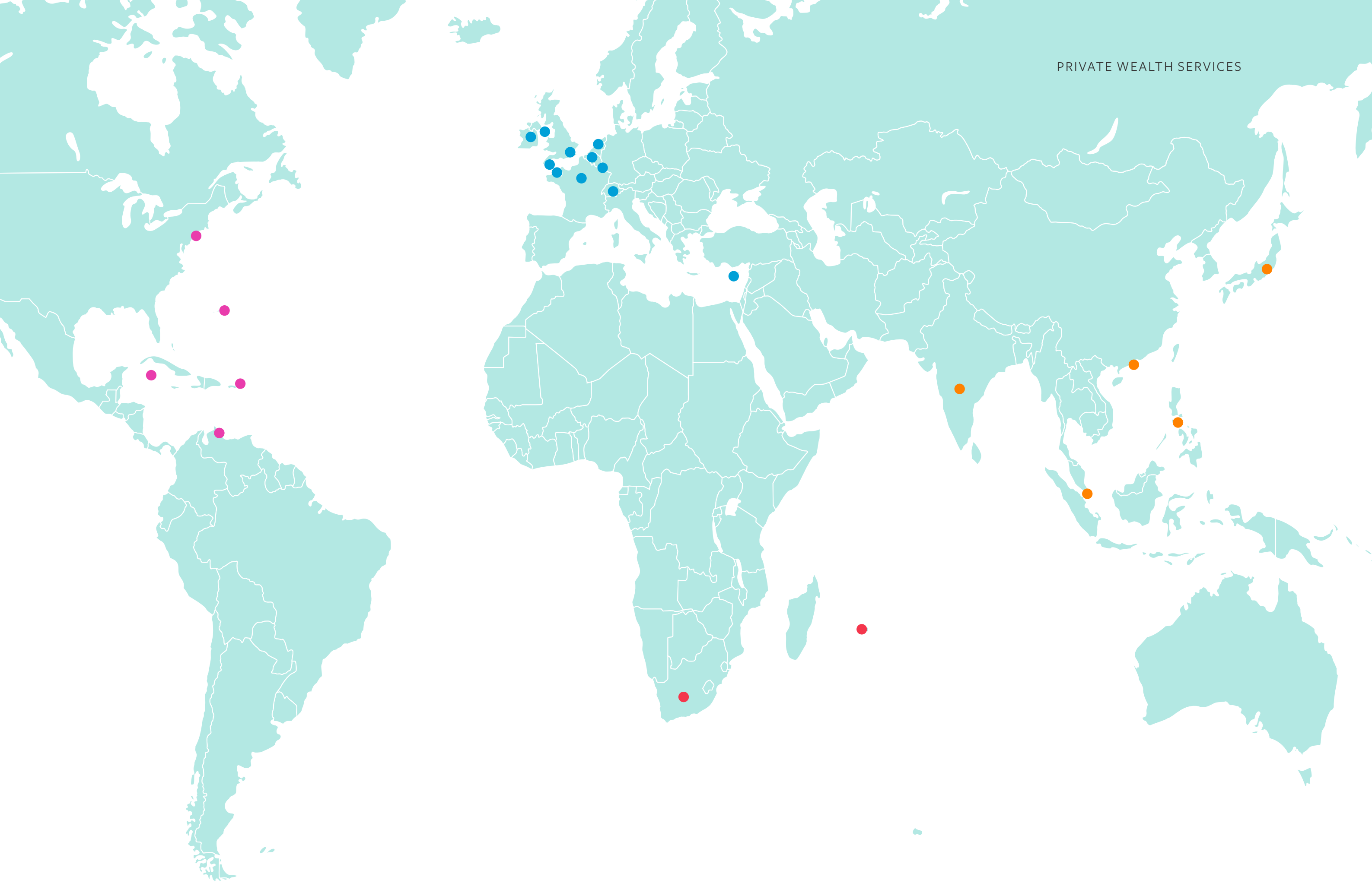

Our locations

We know that private wealth services need to be truly international to meet the needs of you and your family. That's why we have offices in 23 countries, across 4 continents but one dedicated point of contact.

NORTH AMERICA

Bermuda
British Virgin Islands
Cayman Islands
Curaçao
USA

EUROPE

Belgium
Cyprus
France
Guernsey
Ireland
Isle of Man
Jersey
Luxembourg
Switzerland
The Netherlands
UK

AFRICA

Mauritius
South Africa

ASIA

Hong Kong
India
Japan
Philippines
Singapore

IQEQ

Know how Know you

Find out more

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