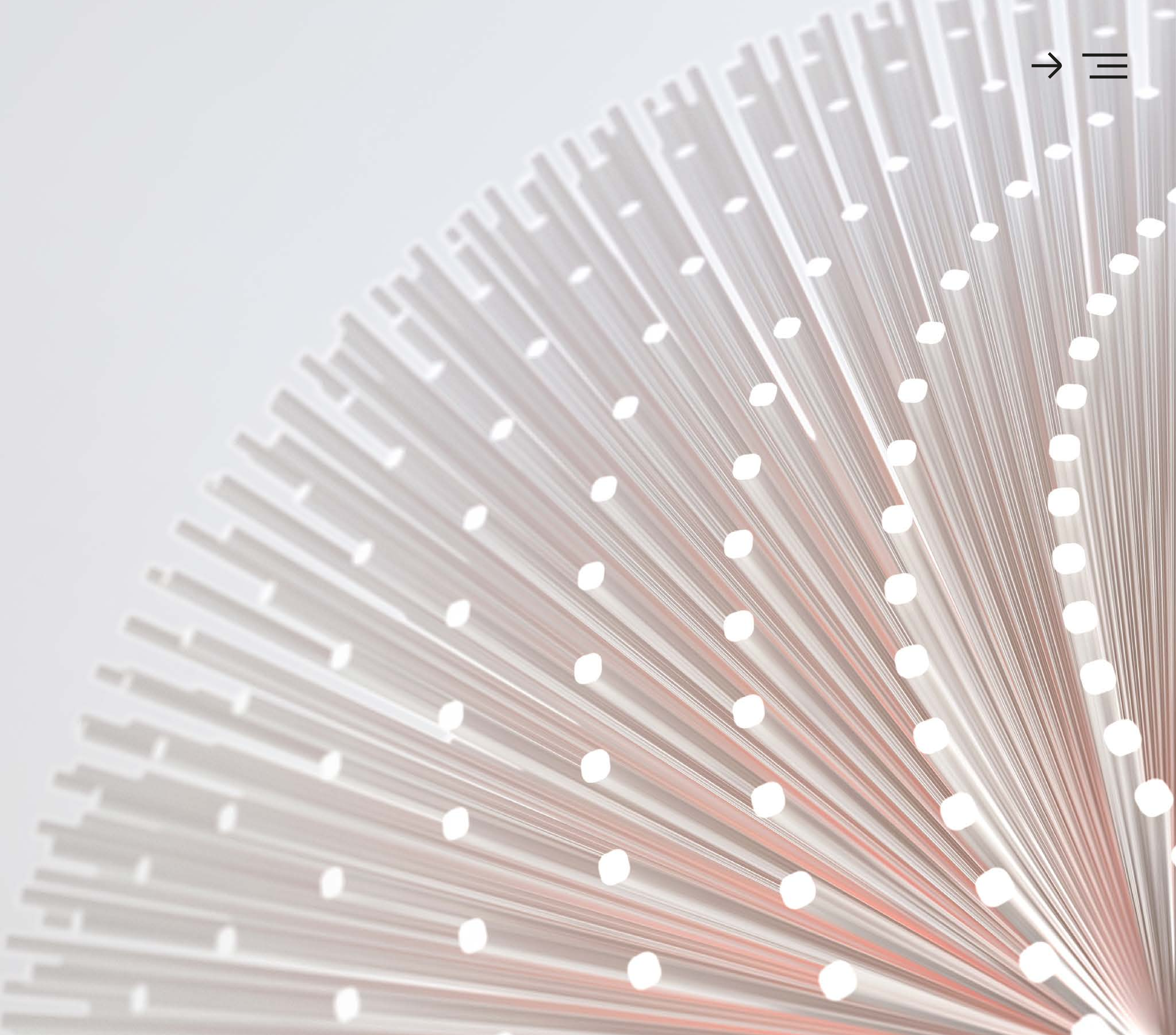
On point

Our **Private Wealth** services



belasko.

Contents

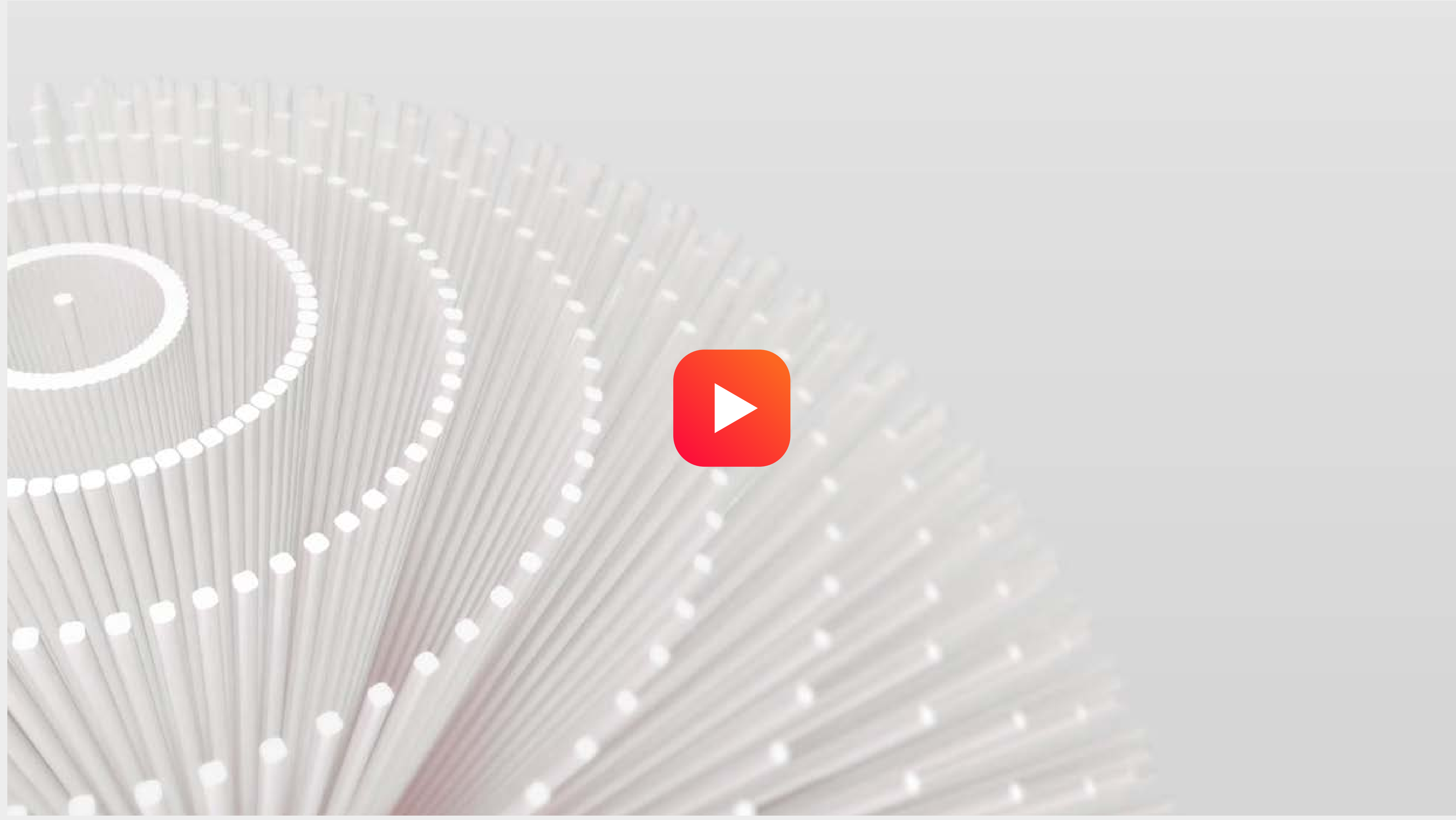
Your **next generation** private wealth partner

We set up Belasko to provide an approach to private wealth administration, which **focuses on excellence and putting our clients needs front and centre** from the first conversation onwards.

We work with families, trusted advisors, entrepreneurs and family offices who want more than a safe pair of hands and share our belief that outstanding administration can actively add value. To deliver on that promise, everything we do is on point – delivering solutions that are precise, personalised and **designed for performance.**

Since launching Belasko, we have grown steadily and evolved, expanding our offering, opening new offices and **investing in the right people and technology.**

Still proudly independent, we offer a service that is built around your requirements and founded on respected, secure systems and robust, proven processes. It's a combination that gives you **real peace of mind** and it is why so many clients trust us to look after their assets.



Find out more about Belasko
in this short video.

4

strategic locations

70+

experienced professionals

$7billion

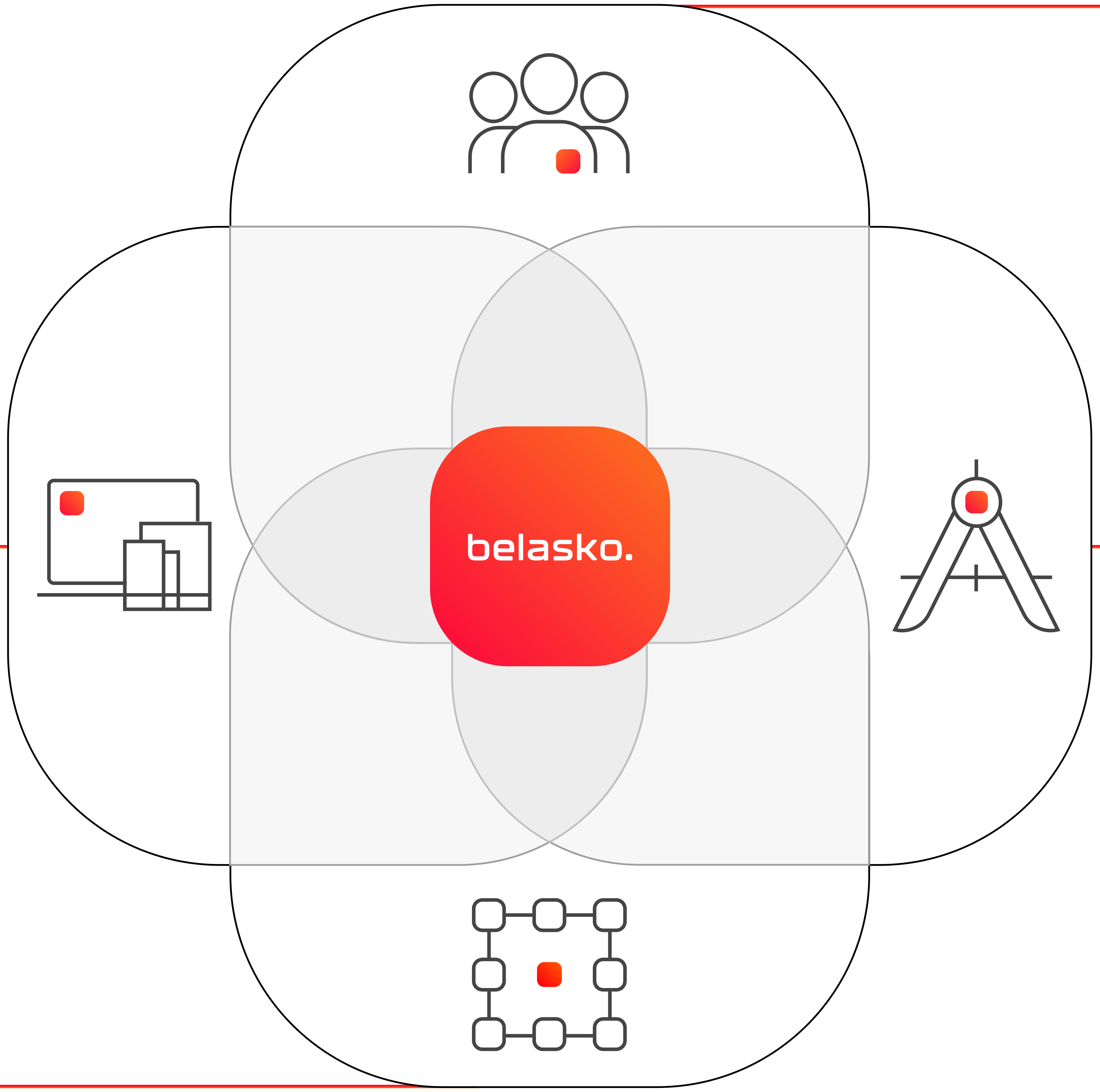
US$7billion AUA

Partnering with us

We are the partner who cares as much about **your interests** as we do our own.

From the start, we use our considerable experience and resources to meet your unique needs, tailoring solutions that are **the ideal fit now and can flex later as your objectives evolve.**

A strategy focused on you



Proven People

Experts in their field.

Experienced, responsive and dedicated, our people act as a seamless extension to your team.

Right Technology

The best tools for the job.

We invest in benchmark technology, applying it to serve your interests, guarantee security and add value.

Total Precision

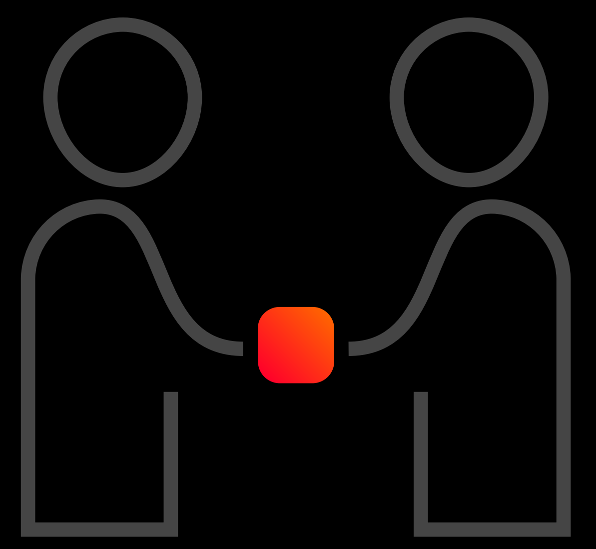
Never off-the-shelf.

Meticulous planning, polished processes and an uncompromising focus on quality shape everything we do.

Real Commitment

Dedicated to excellence.

As a team and individually, we do what it takes to make it first rate every time.

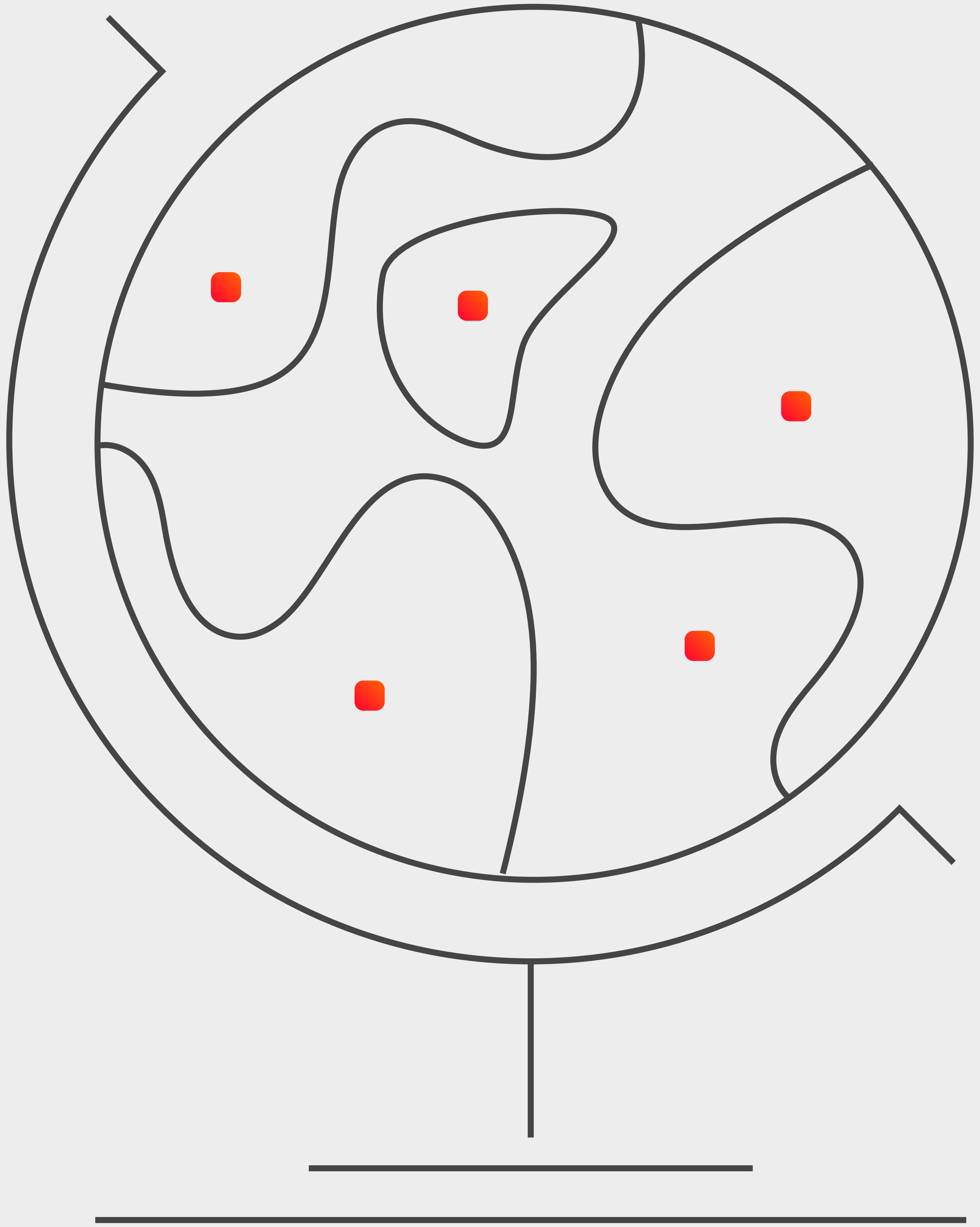


Private Wealth

Optimising wealth across jurisdictions and generations has never been more complex. Our Private Wealth team provides the professional, personalised support you need, drawing on many years' experience of managing the personal and business assets of **high and ultra-high net worth individuals, families and entrepreneurs and their advisers.**

Be it setting up a family foundation, establishing a trust, crewing your yacht or storing your art collection, **our team has the breadth and depth of expertise to understand the financial, regulatory and practical issues at play.** Through our international network, we can meet the specific requirements of the most complex asset structures and wealth strategies.

Learn more about Private Wealth services ↗



Multi-jurisdictional specialists

This reach has seen us develop a particular specialism in **supporting families whose members and interests are based in a number of countries.**

We might, for example, set up multi-jurisdictional structures for a middle eastern family spending part of the year in Europe and with children who are being educated in the US. Or we could establish the appropriate vehicles for a family looking to clearly demarcate their commercial, private and philanthropic assets.

Investing time

Whatever your situation, our starting point is always to take the time to gain a clear picture of **your objectives and ambitions** – both now and how they may change in the future. Our experienced professionals will develop a tailored solution, making sure we **support you seamlessly** on everything from the day-to-day tactical requirements to the overarching strategic objectives.

Your personal network

From the outset, **our people will be at the heart of our relationship.** As well as developing a deep understanding your requirements, they will be your gateway to our wider team and our network of expert partners.

Through this structured approach, you gain the peace of mind of knowing that you will be able to count on us to **anticipate your needs and provide effective solutions** to any challenges you face.

Underpinning everything we do in our Private Wealth team is a **commitment to discretion and security.** These are key priorities for our clients and the reason we continually invest in benchmark systems and technology, applying them in a way that works best for you.

Futureproof support

We also recognise that as your life and family evolve, so too will the type and level of services you require. Our **tailored approach** means that you will always receive the blend of support that works for you in the location where you need it, **whatever the future holds.**

Benchmark software and platforms

NavOne

NavOne software is our current in-house database and accounting platform. The technology is delivered by financial systems specialist TrustQuay and powered by Microsoft's Dynamic Business Central platform.

Board Intelligence

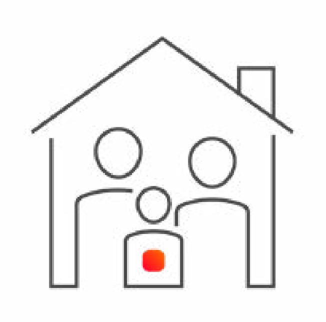
We know how important it is for your board to have the information they need to make fast, effective decisions. This secure online portal simplifies the process of writing, managing and distributing board packs so your team have clear, accurate data where and when they need it.

iManage

Our AI-powered knowledge platform is another tool that helps us to protect and share sensitive documents, keeping you up to date and putting critical data at your fingertips.

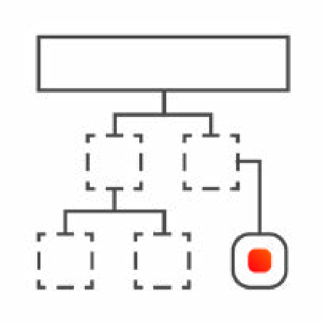
Full-scope, tailored services

We offer a complete Private Wealth service that spans all the key areas where today's high net worth families typically look for guidance and support. This includes:



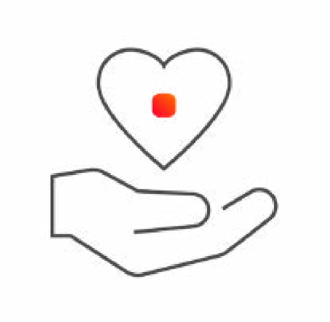
Family Office

We recognise how to address the challenges facing today's family offices and the families they work hard to represent. We have significant experience in assisting families with complex structures and assets in multiple jurisdictions. Led by senior client directors, our team is focused on providing comprehensive and responsive support.



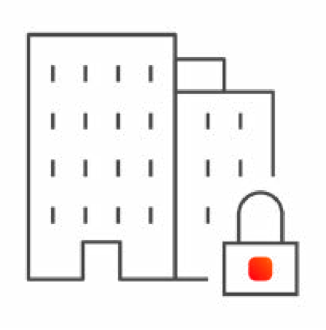
Succession planning

The succession process is one of the biggest challenges an UHNW family face, as many fail to ensure wealth transfer beyond the second generation. We will work with you and your advisers to ensure that there is an efficient and comprehensive transfer and governance of wealth that will provide the best fit for your successors and future family needs.



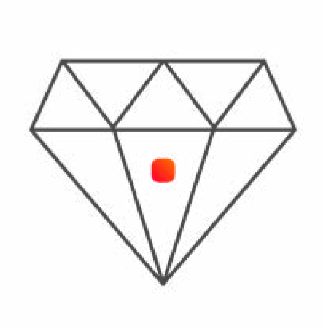
Philanthropy

Whatever your philanthropic goals, our people are here to help you put the right structures and governance in place so you can share your wealth outside your family in a way that maximises the impact of your giving and leaves a lasting legacy.



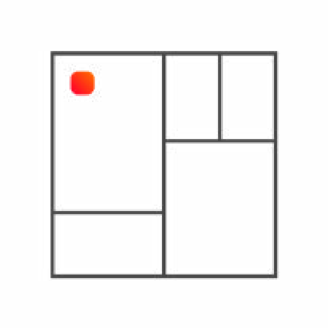
Asset Protection

Asset protection is a key component of financial planning, intended to legally limit creditor access to certain valuable assets. This could include protections against political expropriation, spousal or family member risks and high risk occupations. We work with you and your advisors to ensure appropriate structures are implemented and administered.



Luxury Assets

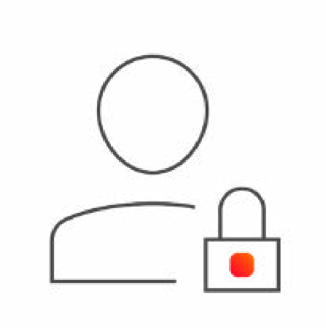
Our team can advise on the optimum ownership structure for a wide range of high value assets – from classic cars to yachts, fine wine to art.



Foundations

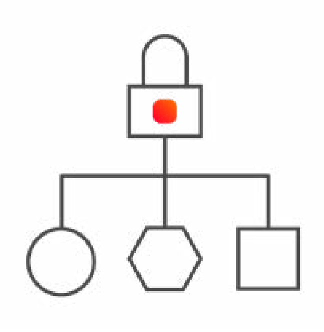
An effective planning tool for private wealth, asset protection and charitable purposes, foundations are attractive alternatives to a common law trust, particularly if you are more familiar with civil law. Our team is able to help with everything from set-up to ongoing administration.

Full-scope, tailored services (continued)



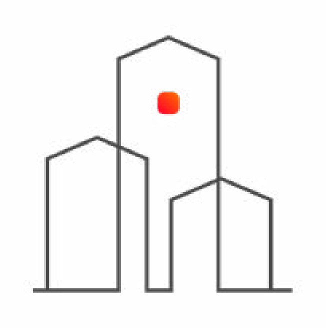
Private Trust Companies

One of the key benefits of a Private Trust Company – which is incorporated solely to act as a trustee of a specific trust or group of trusts – is that this structure enables you to retain an element of influence over your underlying assets by directing the appointment of various roles at each level of your structure.



Managed Trust Companies

If you're expanding into a new market but cannot justify the upfront investment of setting up a new stand-alone office, then a managed trust company is a practical and cost-effective option. It gives you the benefits of having your own branded trust company, with minimised costs and resources. Our team has a long track record of establishing and supporting managed trust company arrangements.



Companies

Setting up a company structure is a simple and discrete way to manage a range of assets and interests. Our team is able to handle the incorporation and administration of a range of Special Purpose Vehicles across multiple jurisdictions.

Trusts

Trusts are typically established for asset protection, succession and estate planning, wealth preservation, avoiding forced heirship rules or protecting the interests of minors. Whatever the rationale, we can work with your advisors to ensure an appropriate trust deed is drafted, act as the regulated trustee and ensure the effective day-to-day management and administration of the trust.

Some of the most common trust types we administer:

- Discretionary Trusts
- Reserved Power Trusts
- Life Interest Trusts
- Charitable Trusts
- Revocable/Irrevocable Trusts
- Asset Protection Trusts

Beyond Private Wealth

We can also support you and your team in other specialist areas of administration.

Fund Services

Our Fund Services deliver a balance of proven processes with a commitment to understanding your specific needs.

Learn more ↗

Corporate Services

With its reputation built on a proactive approach to administration, our team understands how to anticipate requirements and add increasing value over time.

Learn more ↗

To learn more about Belasko, our range of services and how we could support you, **please get in touch.**

Andy Bailey
Head of Fiduciary

Email ↗

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