

# SWISS GLOBAL

TRUSTEES

A DIFFERENT PERSPECTIVE



STABILITY IN AN UNCERTAIN WORLD



*“Creativity is  
intelligence having fun”*

Albert Einstein



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TRUSTEES

A DIFFERENT PERSPECTIVE





## TRUST

Simply defined, a trust is a legal arrangement for holding and transferring assets on behalf of your beneficiaries or an institution. Before establishing a trust, it is important to determine whether it suits your needs and those of your loved ones.

The decision to establish a trust can represent a significant part of an overall financial strategy. Your trust should reflect your values and goals.

*“SGT are committed to  
the process to deliver the  
best result”*



## A DIFFERENT PERSPECTIVE

Swiss Global Trustees is an independent, Geneva based professional Trustee, with access to over 100 jurisdictions globally.

Our focus is identifying current and future needs of individuals and selecting an appropriate Director led service team to meet the clients' requirements and expectations. Working together with clients, their families and advisers, enables us to provide robust and applicable structures to suit their individual needs.

Our worldwide client base is private and public corporates including multinational and asset managers, high net worth individuals and families.

We pride ourselves on our concrete working relationships with leading law firms, banks and accountancy firms ensuring that our highly qualified staff have the expertise to provide an efficient and professional service to our clients and advisers.





## WORKING WITH YOU

Our dedicated team's credentials, extensive knowledge and commitment to client service combine to provide our clients with the very best financial protection.

Through consultations, telephone conferences and electronic communications, we ensure that you have regular access to your team for questions and expert advice. Throughout your relationship, your Portfolio Manager continually focuses on maximising your portfolio's returns based on your needs, risk tolerance and investment objectives.

Working together with the Portfolio Manager, a Trust Administrator oversees and coordinates the following types of solutions and service options designed to meet any objectives.

*"We don't just provide a service, but a relationship and a legacy"*





## COLLABORATING FOR SUCCESS

Your team will collaborate with internal and external professionals to provide direction and strategic advice in several areas, including:

- ▶ Tax and accounting
- ▶ Insurance coverage
- ▶ Estate planning
- ▶ Retirement strategies
- ▶ Charitable gifts
- ▶ Legal issues

They will also offer continuous support to ensure that we develop a comprehensive, complete understanding of your current and future financial needs, and address each unique aspect of your financial life.

By establishing a trust with us, we can also undertake responsibility for:

- ▶ Preparing your annual trust tax return and all associated documentation
- ▶ Making distributions to Beneficiaries
- ▶ Overseeing your real estate interests
- ▶ Distributing principal and income payments
- ▶ Administering funding for complex trusts and other structures



## SERVICES

### PRIVATE WEALTH SERVICES

#### **Wealth Management**

Equity Portfolios  
Property

#### **Wealth Creation**

Corporate Governance  
Pre IPO Stakes  
Treasury

#### **Philanthropy**

Effective Giving

#### **Investment & Treasury Services**

### CAPITAL MARKETS STRUCTURES

#### **Fund Administration**

Private Equity  
Listed  
Mezzanine  
Fund of Funds

#### **Real Estate**

Commercial  
Retail

#### **Structured Finance**

Corporate Services  
Asset Administration  
Corporate Trust Services

### HUMAN CAPITAL SOLUTIONS

#### **Non-Equity Incentives**

Trustee of EBTs  
Investment Monitoring  
Pensions / IPPs  
Employment Cos

#### **Corporate Administration**

Corporate Trustee & Registry Services

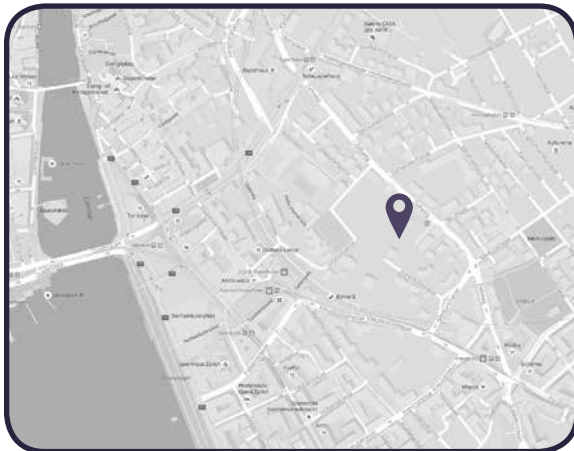
*“SGT plan for not only  
where you are, but for where  
you want to be”*

## CONTACT US



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