

VERUM.  
Swiss banking simplified

## International Estate Planning



## Who we are

In synergy with top-tier global fiduciary services partners, we provide sophisticated, state-of-the-art Wealth & Tax Planning solutions, assuring robust wealth planning structures for you, your family and dependants. Our Wealth & Tax Planning specialists are highly experienced and TEP accredited offshore specialists whose expertise reaches across 27 offshore jurisdictions.

## Our Services

- Corporate services
- Registration of local and offshore trusts
- Independent trustee & protector appointments
- Trust administration
- Registration of local and offshore companies
- Independent director appointment
- Local and offshore company secretarial services
- Local and offshore corporate governance

## Estate Planning

- Local estate planning
- Global estate planning
- Local and offshore wills and testamentary documents
- Administration of deceased estates

## Land & Asset Protection [LAP]

- Onshore asset protection
- Offshore asset protection

## Cross Border Structuring and Transactional Advisory

- Multi-jurisdictional strategies
- International tax planning and tax opinions
- Legal and tax strategies
- Immigration and emigration strategies and advice

## Family Office Services

- Family business succession planning
- Family governance strategies
- Property management
- Daily administration & expense payments
- Local and international family investment corporate structures including specific travel arrangements

## Philanthropy

- Establishment of local and offshore charitable organisations
- Charitable strategies and advisory
- Charitable structure management
- Charitable governance

## Training and Development

Diverse executive and multi-day courses relating to the above-mentioned services.

## Tax and Investment Advice

Independent tax advice is provided by one of our trusted tax advisors, while investment advice is provided by Verum Capital [Pty] Ltd. [www.verum-capital.co.za](http://www.verum-capital.co.za).

## Wills and Estates

Independent advice is provided by one of our estate solutions experts

\* Please note that for some of the above services provided, you will be referred to an independent product specialist partner.

