



ILS
WORLD | BEYOND
BORDERS

INDEPENDENT EXPERTISE
FOR PRIVATE CLIENTS



An aerial photograph of the Palace of Westminster and the Elizabeth Tower (Big Ben) in London. The River Thames flows along the bottom left, with the Westminster Bridge crossing it. The bridge is crowded with pedestrians and a double-decker bus. The Palace of Westminster is a large, ornate Gothic building with many windows and spires. The Elizabeth Tower is a tall, square clock tower with a pointed roof. In the background, the city of London is visible, with various buildings and green spaces. The sky is clear and blue.

| PRIVATE CLIENTS

PRIVATE CLIENTS

ILS World is a global provider of independent fiduciary services with a successful track record advising private clients including individuals, trustees and family offices.

We are trusted advisers, acting in the long term interest of our clients and paying careful attention to the quality and personal service we deliver.

ILS World creates and professionally manages bespoke, multi-jurisdictional structures to meet individual needs and we have particular expertise in advising on private wealth, asset protection, succession and estate planning, trusts and foundations.

ILS World is a unique company in the fiduciary sector. As more and more businesses consolidate into large, private equity-owned companies we have taken the decision to remain independent. Our independence is what sets us apart and gives us a unique proposition to offer our clients and intermediaries. We have stayed true to what we are - a fiduciary - one that isn't in competition with its professional introducers and with no conflicts of interest in our roles as directors, trustees or administrators. Our clients say they appreciate our impartiality, good judgement and professionalism as well as our broad perspective, practical solutions and value for money.

Our private client team consist of committed and qualified specialists. They work hard to create long-term relationships and provide the highest level of service. We do this by being approachable, flexible and pragmatic. We offer regular face-to-face meetings and provide direct contact with a senior member of the team.

Our private clients often require an international strategy and as a global business with offices in a number of key jurisdictions we are well placed to provide a cohesive service. Our network includes offices in:

- British Virgin Islands
- Hong Kong
- Isle of Man
- London
- Portugal



| PRIVATE WEALTH





PRIVATE WEALTH

With today's evolving regulatory environment we recognise future planning can be challenging but our solutions are always bespoke.

Our wide ranging skills mean we are able to put together the right team of people to assist with immediate matters whilst mindful of long term interests and goals.

The private client team provide expert and pragmatic advice to protect assets, minimise wealth dissipation and mitigate the risk of possible future disputes. Whether your goal is to insulate wealth from commercial risk, pass on generational wealth or protect private assets we can work with you.

Many of our distinguished clients have complicated business interests with assets held all over the world often making use of asset protection tools, trusts, foundations and corporate structures.

Through our international network of offices we work with clients to manage property, investment portfolios, passion and cultural assets. We regularly work with the world's leading marine jurisdictions and have registered merchant ships, yachts and aircraft. We also support clients with intellectual property advice to maximise the benefits of your creativity.



| FAMILY CHARTER



A decorative graphic on the right side of the page. It features several overlapping triangles in shades of red and maroon. In the background, a cityscape with tall buildings is visible, partially obscured by the geometric shapes and a layer of mist or fog.

FAMILY CHARTER

The private client team is happy to work with families and their advisers to create a family charter, often the starting point for succession and estate planning.

The charter or constitution gives all interested parties a voice and collectively they work together to set out their long-term vision.

The process of creating a charter is based on many, in-depth discussions and debates and may cover:

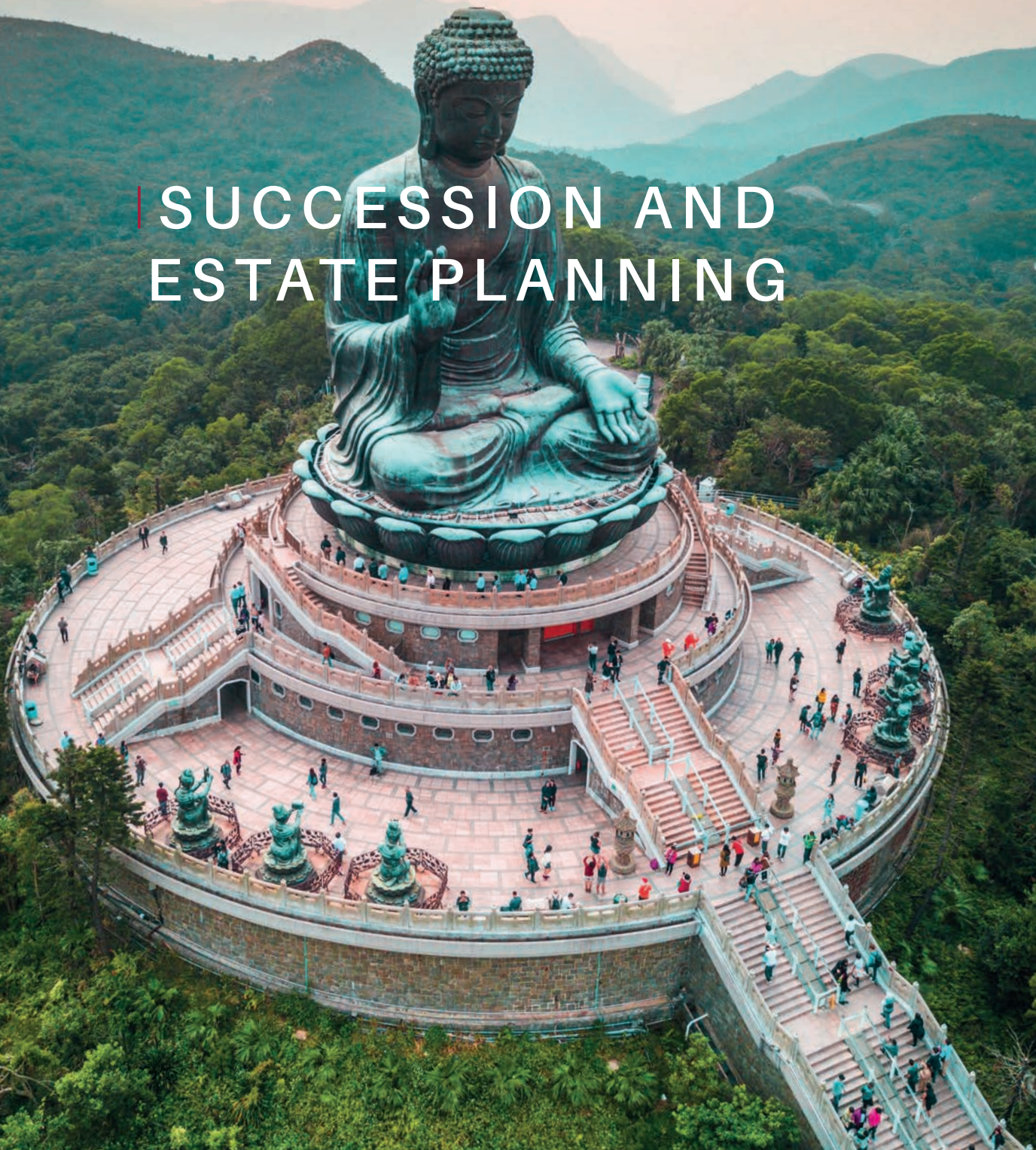
- Values
- A definition of the family i.e. does it include spouses, stepchildren, adopted children?
- The purpose of the business i.e. wealth generation, employment, philanthropy?
- Employment policy for family members
- Experience and qualifications to sit on the Board
- How to deal with conflict?

The appeal of family charters has grown as families have become increasingly more complex, blended, extended and geographically separated. Some entrepreneurs find it difficult to hand over control while a patriarch may want to maintain influence “from the grave”. Often not all beneficiaries are directly involved in the family business while others have very strong views on philanthropy and social advocacy.

It is not a legally binding document but charters often lead to the introduction of more formal documents such as a Shareholders Agreement, Pre and Post-Nuptial Agreements.



SUCCESSION AND ESTATE PLANNING



SUCCESSION AND ESTATE PLANNING

Our private client team has the expertise and experience to advise on the complexities and sensitivities of wealth preservation.

Having worked hard to accumulate assets our clients want to protect it, ensure it is maintained and pass it on to future generations.

Estate planning often requires an international strategy and as a global business with offices in a number of key jurisdictions we are well placed to provide a cohesive service giving clients the reassurance their assets are protected.

We will take time to understand your unique requirements and create solutions that are the best for you.

We will take care to ensure the smooth and cost-efficient transfer of your assets by working closely with you and your benefactors well in advance of the planned succession, clarifying objectives, communicating intentions and choosing the most appropriate and cost efficient vehicles and structures to transfer wealth.

Assets may include business property, real estate, art works, passion assets and family heirlooms as well as investments and pensions - your chosen heirs and your wishes are likely to change and evolve over time and our private client team will work with you to regularly review your wishes.

We have a team of committed and qualified specialists including dedicated private client advisers, accountants, compliance officers, consultants and administrators. Our geographical spread means we are not restricted to a particular jurisdiction and our advice is impartial, practical and shrewd.



| TRUSTS AND FOUNDATIONS





TRUSTS AND FOUNDATIONS

ILS World has a great deal of experience in establishing trusts and foundations in key jurisdictions.

Trusts can provide flexible solutions for a very wide range of wealth planning, family or business needs.

Trusts may be established as stand-alone solutions or as part of a larger structure. Our comprehensive service includes drafting the trust deed, providing a corporate or individual trustee, establishing related corporate structures, maintaining trust accounts, arranging banking facilities and administration. Where necessary we liaise with specialist lawyers to ensure our drafting is bespoke and precise.

The private client team also establish and administer foundations in a number of jurisdictions. They are a robust vehicle for protecting and delivering assets for private, commercial and charitable wealth. Foundations offer flexibility and control over the administration of assets and are ideal for clients more familiar with civil than common law.

Our foundation services include planning and structuring the foundation, preparing the foundation charter, providing council members, where appropriate obtaining charitable status, acting as registered agent together with establishing bank accounts, administration and accounting.



| PHILANTHROPY



PHILANTHROPY

Philanthropy involves giving to worthy causes on a large scale – it is more than just donating.

It is an undertaking by an individual, family or an organisation based on a wish to improve human welfare. It dates from the Greek philosopher Plato, who in 347 BC instructed his nephew to use the proceeds of the family farm to fund a student academy.

More recently the links between entrepreneurship and philanthropy have grown stronger with many inspiring illustrations which combine the two. Hands-on, active involvement has proved to motivate and enthuse many individuals.

There are many different options to drive a philanthropic strategy forward and ILS World has found that our clients fuse together numerous combinations which include social impact investing, donating a percentage of the sale of a particular item to support a named cause as well as the establishment of trusts and foundations.

Whichever philanthropic structure is favoured the team also assist with obtaining charitable status if appropriate.

As philanthropy is driven by an individual's passion, values and concerns solutions are bespoke and the ILS World structuring team is practiced in partnering and working in collaboration with external accredited experts and acknowledged industry professionals to ensure we provide our clients with the best service.



| ENVIRONMENTAL, SOCIAL AND CORPORATE GOVERNANCE



ENVIRONMENTAL, SOCIAL AND CORPORATE GOVERNANCE

Impact investing is not new but has gathered energy in recent years with environmental and social efforts being integrated into traditional business activities as part of the desire to look responsibly towards the future.

Environmental, social and corporate governance issues are often addressed through a family charter as part of a commitment to recognise the tangible and intangible value of integrating these issues into core business activities.

The ILS World private client team is used to partnering and working in collaboration with external experts to create investment policy statements for trusts and the team acts as a natural conduit between investment managers and beneficiaries.

There are a number of options to drive an ESG strategy forward and ILS World has found the entrepreneurs we work with fuse together many different combinations including social impact investing, donating a percentage of the sale of a particular item to support a named cause, fact checking investment methodologies and benchmarking against the United Nations 17 Sustainable Development Goals.

ILS World has been advising private clients for more than 30 years and is experienced at working with private clients with a strong sense of responsibility and stewardship.



| FAMILY OFFICE





FAMILY OFFICE

ILS World gives our distinguished portfolio of family office clients a central resource from which their most valuable private and commercial assets can be coordinated.

As an independent, privately owned company we are ideally placed to work in conjunction with other professional advisers and our worldwide reach allows us to cater for multijurisdictional wishes.

We deliver a high level of support to secure your family's legacy. Our services are bespoke and as the complexity of a family's circumstances increase we will ensure you receive the most appropriate, up-to-date notices and services.

Our family office services provide centralised control over complex wealth arrangements, consistency across multiple jurisdictions, full fiduciary oversight, tax efficient financial services, comprehensive asset holding and protection, clear intergenerational and beneficiary communications, centralised risk profiling, well-regulated and robust corporate vehicles, increased control over wealth management matters, expert legal and fiduciary guidance together with discretion.





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