



MULTI-FAMILY OFFICE SERVICES

Tailored services for your specific family needs

TM

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At Trustmoore (TM), we understand that each client setup is as unique as every family. Therefore, we provide tailor-made services based on the specific needs of the family.

TM provides core family-office services and acts as a generalist, supplemented by specialized external services tailored to our clients' needs. This approach eliminates potential conflicts

of interests, maximizes quality and avoids regulatory challenges.

We are fully independent from any bank, lawyer or audit firm and as a trusted advisor are solely focused on the needs of our family clients. TM, as independent and transparent family office, offers committed, comprehensive consulting, unbiased and free of any product.



"We believe that preserving your wealth requires two key factors: trust and commitment. We guarantee both."

WEALTH MANAGEMENT

Families often face difficult questions related to the management of their wealth:

- How can our wealth be preserved and/or expanded?
- What are the individual wealth objectives (as part of a family)?
- How should our wealth be invested?
- What is a suitable structure for us?

TM can provide answers, helping families determine the strategic asset allocation of their wealth, decide on investment policies, and consequently, asset and/or fund-manager selection. In addition, the most efficient and most effective legal structure for meeting wealth-management goals can be determined.

Owing to our current client base and the fund services we provide in several countries, we have an extensive network of banks, fund managers and asset managers in all major asset classes.

TM does not act as an asset manager but reports on, monitors and controls the wealth of its clients and assists with asset managers and/or fund selection where and when needed.

The most-important aspects of effectively managing wealth are transparent, effective and efficient accounting and reporting of family assets. TM uses the most-efficient tools to generate clear and comprehensive consolidated asset reports to provide clients an easy, periodic wealth overview. In addition to reporting, we actively monitor and analyze asset manager performance, proactively engaging them directly to discuss their performance and tactical decisions made or planned. Our effective accounting systems ensure performance can be properly analyzed, portfolios are compliant with investment guidelines, and relevant information is available for proper tax assessment.

LEGAL STRUCTURE

TM maintains legal structures that are tailor-made, based on the specific needs of the client. In many key jurisdictions, TM is a licensed and supervised fiduciary-service provider and can act as director, board member and trustee of family-owned entities and trusts. In its formal role, TM provides core multi-family office services, ensuring that entities and trusts maintain requisite financial accounts and always comply with local (tax) laws and regulations. The combination of our wealth management and fiduciary services ensure that investment approach and management are securely situated in the formal decision-making bodies of the investment entities.



LEGAL AND TAX NEEDS

TM has in-house lawyers who can review or draft legal documentation. In addition, our in-house consultants are intuitive when it comes to situations where thorny legal or tax issues could arise. Should these specific legal or tax-related topics become relevant, TM makes use of an extensive network of external specialists to make sure the best service is provided. We believe that engaging external experts for such matters is more cost-efficient and more-effective due to their extensive and varied experience.



FAMILY GOVERNANCE

Family governance is a structured process for educating and facilitating communication and decision-making between family members. Good, effective family governance safeguards stability within a family. It not only promotes healthy relationships between family members, but also ensures that they are committed to the stewardship of family assets, speaking with a single voice towards businesses and advisors. The family governance setup is strongly dependent on the size and structure of the family itself.

TM has extensive experience with family governance issues and can assist in setting up a governance model and guiding families through the implementation of governance processes. We can manage family meetings, ensuring they are effective and properly documented.

Services summary:

- Corporate management services
- Trustee services
- Assistance with strategic asset allocations and portfolio monitoring
- Asset protection solutions
- Family Business ownership structuring and governance
- Family Statutes
- Succession planning
- Day to day support services
- Relocation assistance
- Yacht or residence management
- Retirement planning

CONTACT US TODAY

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