

Case study: Entrepreneur



The scenario; a Singaporean resident and domiciled entrepreneur, who held extensive assets, both personally and within his successful trading company. Our client wished to protect and enhance his interests, in order to meet the long term needs of his young family. However, his busy life made focusing on his wealth a challenge.

Affinity's role; over the past few years, working with several international firms of accountants and lawyers, we have consolidated the client's personal and business assets across several Jersey Discretionary Trusts and a Reserved Powers Trust.

Our client is able to concentrate on his business ventures, safe in the knowledge that the assets are protected for the benefit of future generations.

We also hold seats on the boards of the three trading companies, helping to coordinate the expanding corporate activity across Europe, Asia and North America.

Reliability, timely communication and a no-nonsense attitude were all key attributes the client sought in a trustee. The team also needed to be experienced and approachable, in the event of an untimely death of the principal earner.

Today, we enjoy a close working relationship, as reflected in the words of the settlor;

"It goes without saying that I am very happy to be one of your clients. I have found you to be efficient, clear and hardworking – in short – my kind of people"