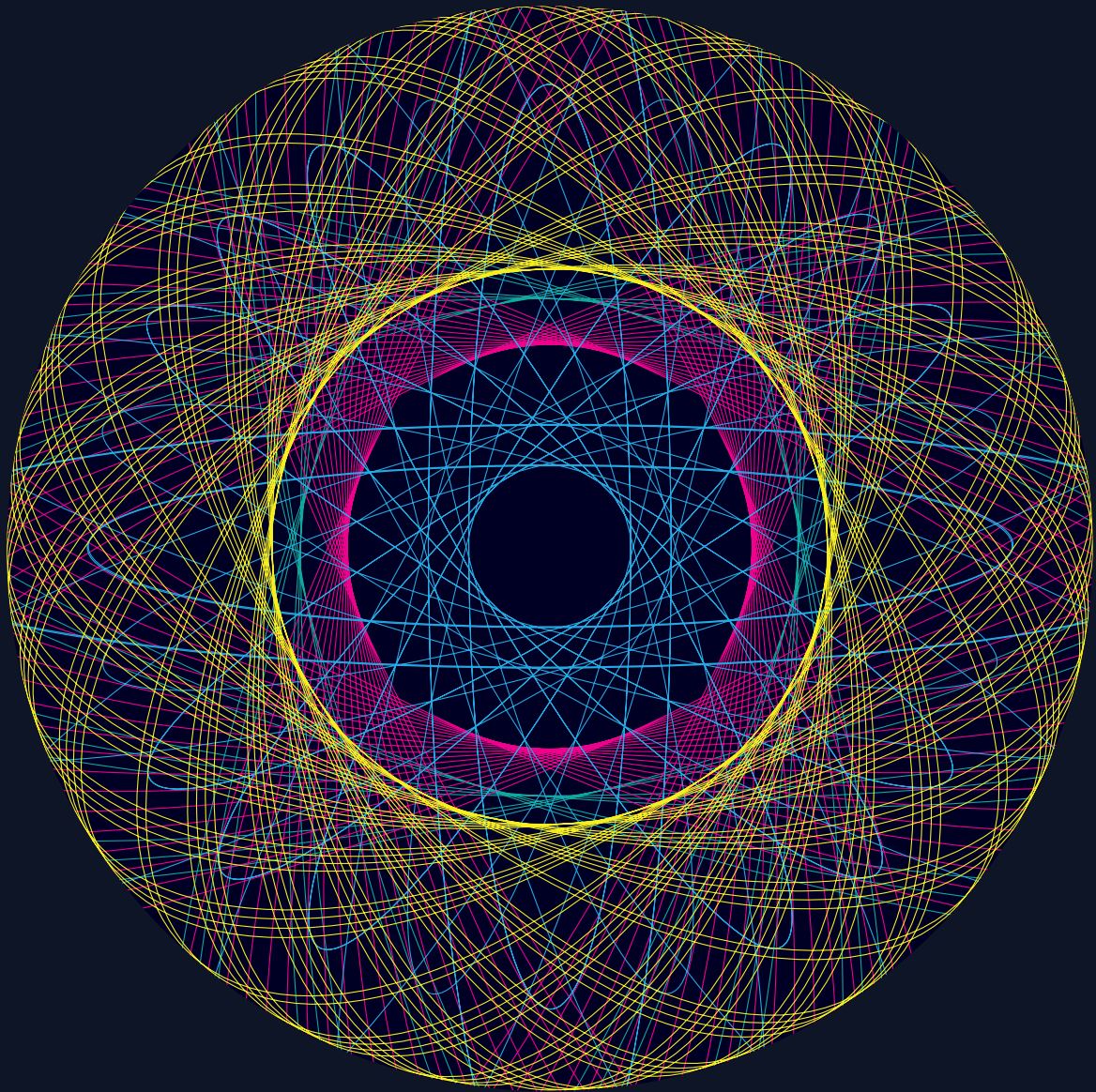


Legal services
Trusts Advisory Group



Ogier

A powerhouse
team, providing
invaluable advice
on high-value
matters.

Chambers Global, Guernsey, Trusts, 2020

Contents

Who we are	3
What we do	4
Our client service approach	6
Contact us	8

Who we are

Our team's strength is the quality and breadth of our experienced lawyers, who work together to deliver a discreet and professional service.

Ogier's Trusts Advisory Group, a team specialising in private client, dispute resolution and corporate law, draws together experts with substantial experience in Ogier's key private client locations.

Our Private Wealth team advises trustees, private banks, financial institutions, fiduciaries, family offices and high net worth clients and their advisers on the lifecycle of trusts from establishment, restructuring and administration to succession planning. We have in-depth knowledge of trusts and foundations, enabling us to provide flexible and practical guidance on choosing the most effective structure and jurisdiction.

Our Dispute Resolution specialists have a strong track record in dealing with contentious issues. Ogier has acted successfully in many of the headline international trust and private client matters in recent years in BVI, Cayman, Guernsey and Jersey.

A differentiating factor of our Trusts Advisory Group is our embedded corporate support to corporate entities underlying trusts and foundations. All three teams work together to provide a seamless service.

Services and areas covered include:

- Trust drafting and establishment
- Trust advice
- Discretionary trusts
- Charitable and non-charitable purpose trusts
- Guernsey and Jersey reserved powers trusts
- BVI VISTA trusts
- Cayman STAR trusts
- Guernsey and Jersey foundations
- Corporate advice to underlying structures
- Private trust companies
- Employee incentives and employee benefit trusts
- Regulatory
- Family Office
- Advising on resolving breaches of trust
- Court applications concerning trusts
- Trust disputes
- Estate planning
- Pensions



The team represents a top tier collection of wide experience and areas of expertise within the sector.

Legal 500 UK, Jersey, Private Client, Trusts and Tax, 2021



They always go the extra mile to provide timely and well thought through advice.

Chambers UK, Guernsey, Dispute Resolution, 2021



Ogier is one of the leading litigation firms in the Cayman Islands, with a winning reputation in a crowded field.

Legal 500 Caribbean, Cayman Islands, Dispute Resolution, 2020

What we do

Our lawyers regularly receive plaudits and awards: 'Fantastic lawyer', 'technically sharp', the 'trust guru when it gets tricky'.

 One of the best in the BVI in terms of legal ability, quality of service and plain old fashioned client care.
Legal 500 Caribbean, BVI, Dispute Resolution, 2020

 They are professional and responsive, and the advice is to-the-point and well considered.
Chambers UK, Jersey Dispute Resolution, 2020

From simple to more sophisticated structures and whether established for succession purposes, asset protection, tax efficiency, family governance or confidentiality, the team is focused on providing the absolute best and right advice for each client.

We advise trustees, settlors and beneficiaries, and anyone else connected with trusts and foundations, who all benefit from our highly professional and sensitive approach.

Our team offers a seamless contentious and non-contentious advisory service which also includes relevant corporate support to structures underlying trusts.

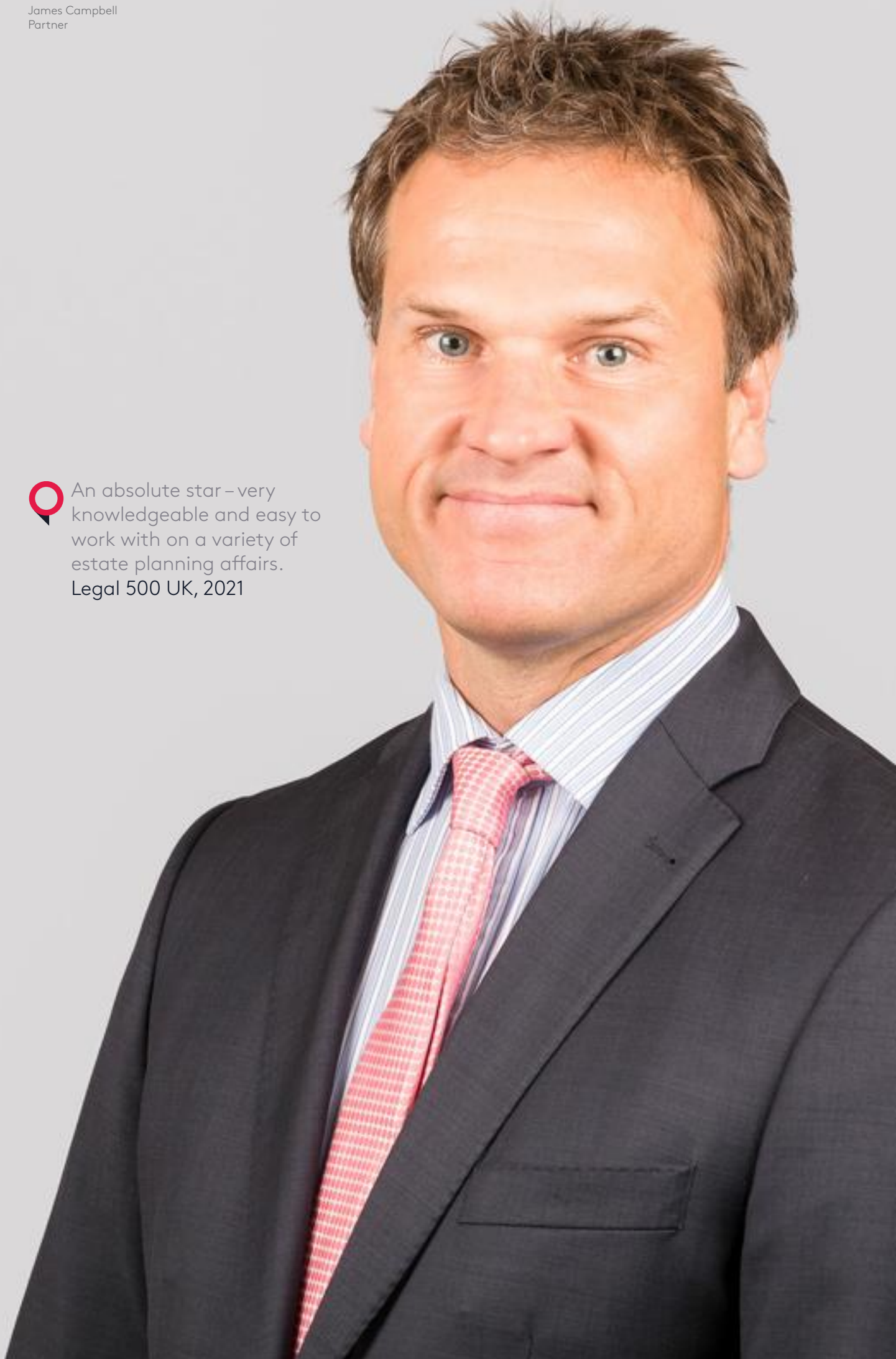
We can also help to resolve disputes and make Court applications concerning trusts and foundations, should the need arise. While our Corporate team has been involved on some of the largest and most complicated deals taking place in our jurisdictions in recent years, we also have extensive experience in advising on the establishment of many forms of domestic and crossborder corporate vehicles, trusts and partnerships.

We are a highly skilled specialist team who use our expertise to provide the best service to our clients, at a level that cannot always be provided by a more generalist practice. Expert advice when establishing private client documentation can prevent difficulties and expense at a later stage.

Trusted by market leaders


Our Trusts Advisory Group receive referrals and instructions from some of the leading global legal and financial trusts industry including banks, leading accountants and lawyers. We also act for many ultra high net worth individuals and significant family offices.

 An absolute star – very knowledgeable and easy to work with on a variety of estate planning affairs.
Legal 500 UK, 2021



Our client service approach

97% of our clients say they would re-instruct us and recommend us to others.

 They are a big team with a specialism in trust benefit work for high net worth clients.
Chambers HNW, Jersey, Private Wealth, 2021

Our client satisfaction programme, run in conjunction with an independent research agency, is both a measure and a benchmark for us to act on feedback to continually improve.


 Ogier has first-class interpersonal and communication skills.
Legal 500 UK, Guernsey, Private Client, Trusts and Tax, 2020

Acuigen's research helps us retain client confidence as we evaluate how effectively we scope their work and understand their objectives.

 Provides a very personalised service to clients.
Legal 500 Caribbean, Cayman Islands, Trusts and Private Client, 2020

Clients tell us they value our technical excellence, business acumen and attention to client service. Satisfaction levels and likelihood to recommend are driven by meeting agreed timescales, being commercially focused, demonstrating innovative thinking and providing clear and understandable advice.

Anthony Partridge
Partner
Cayman Islands

 Very responsive, reassuring,
knowledgeable and easy to
speak with - he is amazing
to work with.
Legal 500 Caribbean, 2020



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Ogier provides practical advice on BVI, Cayman Islands, Guernsey, Jersey and Luxembourg law through our global network of offices across the Asian, Caribbean and European timezones. With a growing team of more than 700 people around the world, we regularly win awards for innovation, client service and quality. Regulatory information can be found at ogier.com