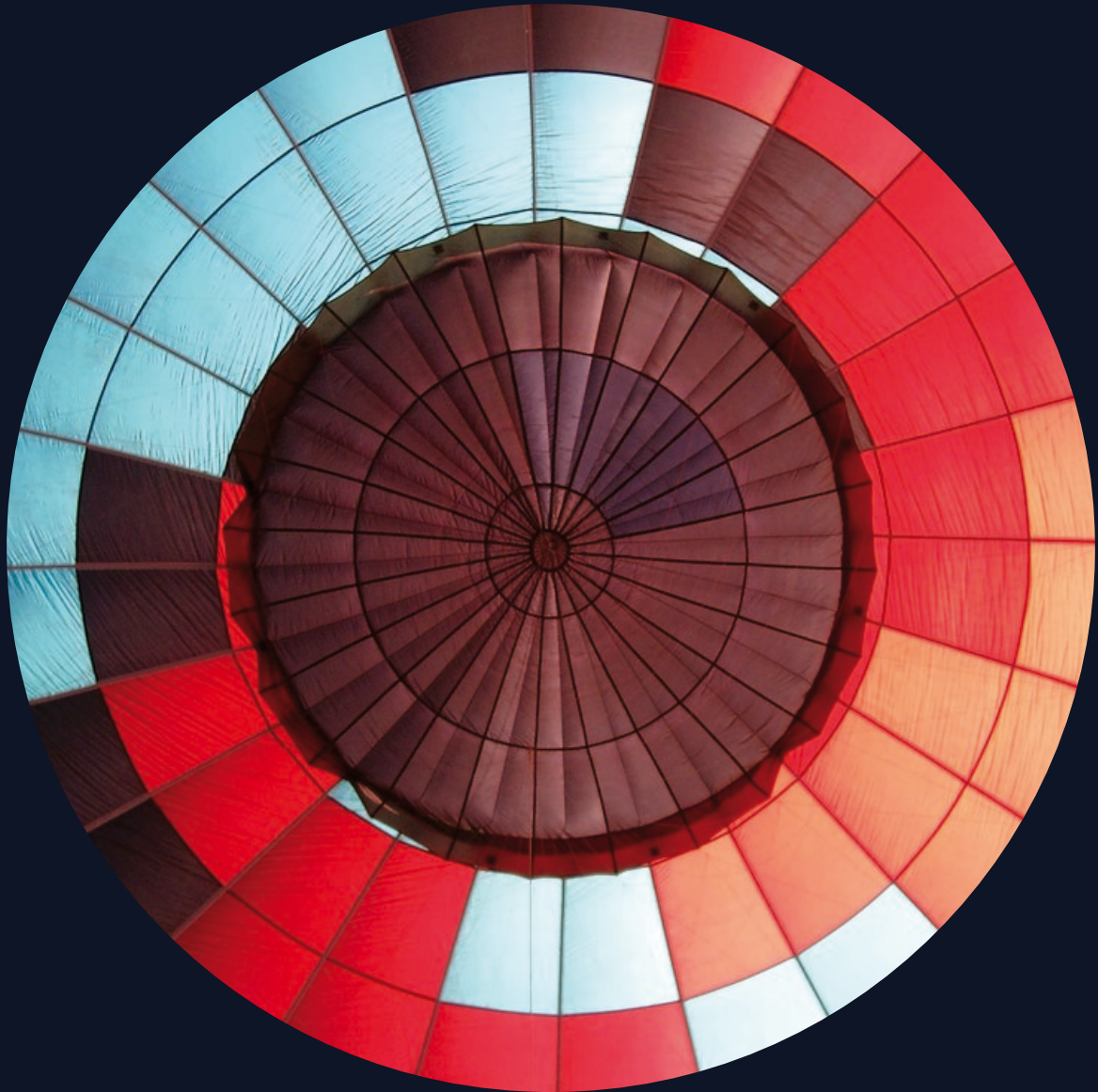


Ogier in Asia  
Private Wealth



Ogier

# Ogier are the preeminent offshore law firm.

Chambers High Net Worth, 2024

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## Market recognition

Ogier's Private Wealth team are consistently highly ranked in the legal directories and industry body awards. Recent notable recognition include:

"The Ogier team goes out of its way to find the answer or advice you need. It always maintains the lead, ownership and accountability for client matters to deliver a great client experience."

**Chambers High Net Worth Guide, 2025**

"Really strong team in Hong Kong with several market leading partners. Link up very well with their other offices in the Caribbean to provide timely and quality advice."

**Legal 500 Asia Pacific, 2025**

"Its multilingual service team, most of which are fluent in Mandarin, Cantonese and English, is able to communicate closely with clients in China on different projects."

**Chambers Global, Asia-Pacific, 2025**

"Ogier is pragmatic, alert to risks and engaging enough to listen to clients in order to carve the most sensible path."

**Chambers Global, 2025**

"We have full confidence in the Ogier team to provide appropriate and concise advice on any legal matter that arises, no matter how complex."

**Chambers High Net Worth Guide, 2024**

"No other firm is currently achieving Ogier's current combination of top level technical skills, acute commercial judgement, and ready availability when we need them. They clearly work very hard indeed but will always make time for us."

**Legal 500 UK, 2025**

"They are quick to align internally and deliver practical solutions under time pressure."

**Legal 500 EMEA, Private Client 2025**

"Excellent team who turn around work in a timely manner and think through relevant matters carefully and with a useful pragmatism. Have the scale to cope with a large number of matters when needed and have some very good associates."

**Legal 500 UK, Guernsey, Private Client 2024**

"For me, Ogier worldwide are the preeminent offshore law firm."

**Chambers High Net Worth Guide, 2024**

"They couple a private client expertise with the corporate mindset which clients are looking for."

**Legal 500 UK, 2024**

"I would describe them in 3 words: friendly, approachable and proactive."

**Legal 500 UK, Jersey, Private Client 2024**



Offshore Law Firm of the Year  
Chambers High Net Worth Awards 2025



Best Offshore Law Firm - Client Service  
HFM Asia Services Awards 2025



Best Offshore Law Firm  
Wealthbriefing European Awards 2025



UAE Law Firm of the Year  
Citywealth IFC Awards 2025



Best Offshore Law Firm  
HFM Asian Services Awards 2024



Law Firm of the Year - Jersey  
Citywealth IFC Awards 2024



Best Offshore Regulatory & Compliance Firm  
Hedgeweek European

-  **Fintech Services Firm of the Year**  
BVI Financial Services Awards 2024
- Matt Guthrie, Partner, Guernsey**  
"Has excellent technical ability and is able to pick up on the key elements without issue and cut through to the heart of what is really important."  
*Legal 500 UK, 2024*
- James Campbell, Partner, Jersey**  
"James is an excellent lawyer. He is a leader on the island. He handles matters in a sensible way, he is very collaborative and responsive, and he makes sure that deadlines are met."  
*Chambers High Net Worth Guide, 2025*
-  **Offshore Firm of the Year**  
The Lawyer European Awards 2024
- "Matt is astute and client-oriented, whilst remaining grounded and practical, delivering and collaborating well on high-value, complex issues in a straightforward way. He is a joy to work with."  
*Chambers High Net Worth Guide, 2023*
- Grace Gao, Counsel, Hong Kong**  
IFC Rising Star - Woman of the Year - Gold  
*Citywealth Powerwomen Awards 2026*
-  **Contentious Trusts and Estates Team of the Year (large firm)**  
STEP Private Client Awards 2024
- "Good technical knowledge and leads a strong team who understand the way in which Jersey trusts and company businesses work."  
*Legal 500 UK, 2024*
-  **Corporate Services Provider of the Year**  
BVI Financial Services Awards 2024
- Anthony Partridge, Partner, Cayman Islands**  
"Anthony Partridge has the wonderful ability of making the complex seem simple. He is a first rate lawyer that truly cares for his clients."  
*Chambers High Net Worth Guide, 2025*
- Key Lawyer**  
*Legal 500 Asia Pacific, 2026*
-  **Law Firm of the Year Domicile 2024**  
Hedgeweek European Emerging Manager Awards
- "Anthony Partridge and Gregory Haddow are the leading lights of the non-contentious private client team at Ogier – they work superbly together with Anthony as partner using his deep knowledge of Cayman backed up by Gregory's excellent client first approach."  
*Legal 500 Caribbean, 2024*
- IFC Lawyer of the Year - Managing Associate - Gold  
"Grace has a thoughtful, solutions-driven approach and ability to coordinate complex workstreams. She exemplifies the modern cross-border private client lawyer."  
*Citywealth Future Leaders Awards 2025*
-  **Best Law Firm Fund Domicile Private Equity Wire European Awards 2024**
- Josephine Howe, Partner, Jersey**  
"Josephine Howe is always a delight to work with, and her legal knowledge on charities and philanthropy is very impressive. She is keen to get involved and great to work with."  
*Chambers High Net Worth Guide, 2025*
- Key Lawyer**  
*Legal 500 Asia Pacific, 2025*
-  **Best Offshore Law Firm**  
ALB Hong Kong Law Awards 2023
- Rising Star - Trusts and Estates**  
*IFLR 1000, 2022*
-  **Deal of the Year - Loan Category**  
IFLR Asia-Pacific Awards 2023
- "Josephine is extremely commercial, with a very fast turnaround. She is a very responsive lawyer."  
*Chambers High Net Worth Guide, 2024*

Grace Gao  
Counsel  
Hong Kong



Grace has a thoughtful, solutions-driven approach and ability to coordinate complex workstreams. She exemplifies the modern cross-border private client lawyer. Citywealth Future Leaders Awards 2025



## Ogier in Asia

We act for leading financial institutions, investment managers and corporate entities from start-ups to global household names.

### Hong Kong

Ogier has built a prominent legal practice working with clients across the Asia-Pacific region. Our Hong Kong team advises on all aspects of BVI, Cayman, Guernsey and Jersey law. We are proud to also have full service offices in Luxembourg and Ireland, which means we are able to provide fully integrated advice from Asia on Luxembourg, Ireland and offshore law.

Ogier provides clients with a full-service offering. We offer international finance and corporate law advice with a particular emphasis on investment funds, private equity, mergers and acquisitions, capital markets and finance. We also have a significant and growing dispute resolution practice providing contentious and non-contentious restructuring and insolvency legal services.

Ogier's dedicated private wealth team in Hong Kong, supported by a substantial network across our international offices, delivers advice to high net worth individuals, families, family offices, and trustees throughout Asia. To better serve our Asia-based clients, our team members are fluent in Cantonese, English, Japanese, and Mandarin.

### Beijing and Shanghai

Our team in our Beijing and

Shanghai offices works closely with the team in Hong Kong to provide clients in mainland China with direct access to Ogier's global network. Our Shanghai team works with a wide variety of high profile, mainland Chinese law firms, family offices, banks, private and listed companies, and asset management firms including private equity, hedge fund and venture capital managers.

### Singapore

Our team are fluent in Mandarin and English, with extensive experience supporting asset managers, institutional clients and corporates. Our services include the provision of governance (professional directors), corporate administration, AML officers and AEOI services to Cayman and BVI domiciled vehicles, also providing a full suite of corporate administration services to Singapore-domiciled fund vehicles and SPVs.

### Tokyo

Through our office in Tokyo, Ogier is able to provide Japanese and English language support to Japan-based clients wishing to take advantage of Ogier's global network of offices. Our Tokyo team works closely with the Hong Kong team, focusing specifically on the South Korean, Hong Kong and Singapore investment funds and structured finance markets.



Has excellent technical ability and is able to pick up on the key elements without issue and cut through to the heart of what is really important.

Legal 500 UK, 2024



## About Ogier

We get straight to the point, managing complexity to get to the essentials.

### Who we are

Ogier is a leading provider of offshore legal services. We advise on BVI, Cayman, Guernsey, Irish, Jersey and Luxembourg law. We are the only firm that advises on these six laws.

Corporate and finance law form the core of our business, principally in the areas of banking and finance, corporate, investment funds, dispute resolution and private wealth. We also have strong practices in the areas of employee benefits, employment law, regulatory, restructuring insolvency, property and tax.

Our team has the knowledge and expertise to advise on the most complex and demanding international cross border transactions. We pride ourselves on providing agile, expert, efficient and cost-effective advice and services across all time zones.

Our commercial understanding and experience of working with leading financial institutions, professional advisers and regulatory bodies enable us to add real value to our clients' businesses.

### Where we are

We are the only law firm to have a substantive presence in the BVI, Cayman, Dubai, Guernsey, Hong Kong, Ireland, Jersey and Luxembourg. Our network of offices also includes Beijing, London, Shanghai, Singapore and Tokyo.

### Our approach

Our approach is to keep it simple. Resource work at the right level. Don't over lawyer, don't over engineer. We are agile and strive to work through complexity to provide sound judgement on what really matters, not losing sight of the need for effective project management and superb client service.

We are committed to building long-lasting relationships that are based on confidence and trust. We listen to client feedback gained through third party interviews and seek to continually improve the quality and value of service we provide.



A good leader, nurtures the practice and is commercial and explains issues to clients in a clear and helpful manner.

Legal 500 UK, 2023



## Practice areas

### Private Wealth

Our Private Wealth team advises trustees, private banks, financial institutions, fiduciaries, family offices and high net worth clients and their advisers throughout the lifecycle of trusts from establishment, restructuring, administration and termination.

We have in-depth knowledge on a range of trusts and foundations including BVI VISTA trusts, Cayman STAR trusts, reserved powers trusts, private trust companies, offshore companies, Jersey foundations, Guernsey foundations and Cayman foundation companies.

### Dispute Resolution

Our dispute resolution team offers BVI and Cayman Islands legal advice to banks, financial intermediaries and corporates, individual directors, shareholders and creditors. The team often advises in conjunction with onshore counsel and other professional services providers and maintains excellent relationships with regulators in the BVI, Cayman and Hong Kong.

### Banking and Finance

Our Banking and Finance team works on a large variety of loan financings, debt capital market deals (both private and public) including a number of significant RMB denominated deals, structured finance transactions and non-contentious restructuring and insolvency matters.

### Corporate

Our China-focused Corporate practice provides specialist BVI and Cayman advice on many of the region's most complex and innovative transactions. The Mandarin-speaking team has extensive experience advising on mergers and acquisitions (public

and private), initial public offerings (IPOs), debt capital markets, pre-IPO financings and joint ventures.

### Investment Funds

Our Investment Funds team operates across a wide spectrum of fund structures and their particular regulatory and commercial approaches.

With the additional support of our experienced fund finance and dispute resolution specialists we provide a one-stop-shop for the full funds lifecycle ranging from fund formation, structuring, regulation, corporate governance and investor disputes through to management of liquidity and business interruptions, strategic investor arrangements and wind-down and termination situations.

The team primarily focuses on Cayman Islands investment fund products, however we also advise on BVI, Luxembourg, Jersey and Guernsey laws and have the legal capability in Hong Kong to advise on investment fund products domiciled in these jurisdictions.

### Restructuring and Corporate Recovery

Our Restructuring and Corporate Recovery team has extensive cross-border and international experience advising on contentious and non-contentious restructuring and insolvency matters, often advising in conjunction with onshore counsel, insolvency practitioners and other professional services providers.

### Tax

Ogier works hand in hand with tax departments at onshore law and accountancy firms on cross border advisory and transactional tax matters.

Josephine Howe  
Partner  
Jersey



Josephine is very  
technically able and  
very nice to work with.  
Chambers HNW



## Private Wealth

### Your trusted advisers

Our international private wealth team advises on private wealth laws in BVI, Cayman, Guernsey, Ireland, Jersey and Luxembourg.

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

Our client base includes trustees, fiduciaries, settlors, beneficiaries and family offices and their advisers. High net worth clients in both mature and emerging markets – particularly in Asia where we have offices in Hong Kong, Shanghai and Tokyo - looking for a trusted adviser to help them in securing their personal and professional future, benefit from our sensible approach and innovative structuring.

Beyond trusts, foundations and companies, the team has very considerable expertise in advising on and drafting wills as well as obtaining grants of probate and letters of administration for clients with shares or other assets in BVI, Cayman, Guernsey and Jersey.

### Our team

The strength of our team is in the quality and breadth of experience of our lawyers, who work together to deliver a discreet and professional service.

Our Hong Kong team work closely with offices in BVI, Cayman, Guernsey, Ireland, Jersey, Luxembourg and Singapore to provide seamless service to clients in Asia.


Grace Gao leads our private wealth offering in Asia, Grace speaks English, Cantonese and Mandarin. Being trilingual means that she is well-placed to advise Asian families with international elements.

Grace is supported in Guernsey matters led by Matt Guthrie, Jersey matters by the Jersey team led by partner James Campbell and the Cayman-based team, led by Anthony Partridge.

### Services include:

- Trust structuring, drafting and establishment
- Advice on trust jurisdiction
- BVI Vista Trusts
- Cayman STAR Trusts
- Cayman foundation companies
- Guernsey and Jersey foundations
- Luxembourg life insurance policy
- Charitable and non-charitable purpose trusts
- Corporate advice to underlying structures
- Contentious trusts
- Employee benefit trusts
- Estate planning - combination of trust, foundation, life insurance policy
- Family Office
- Philanthropic structures
- Private trust companies
- Regulatory
- Will, probate and estate administration
- Mental capacity

Anthony Partridge  
Partner  
Cayman Islands

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



## Employee incentives and pensions

Our team advises on all matters relating to the use of trusts for employee incentivisation and pensions.

We act for corporates, trustees and employees around the globe who have existing schemes or want to introduce new schemes to retain and incentivise their key employees.

Our team can design and structure new incentive arrangements including share options plans, savings schemes, bonus schemes as well as assisting with establishing a wide range of incentive arrangements including employee ownership trusts. We advise trustees, individuals and corporate entities on their arrangements and offer support across the lifetime of schemes, through to termination and wind-up.

We advise on the full range of legal, regulatory and tax issues relating to pensions in Jersey, Guernsey, the British Virgin Islands and Cayman Islands, from establishment of tailored jurisdictional schemes to assisting on buy-out, closure to future accruals and winding up. We advise a significant number of banks and other financial institutions on their employee pension schemes in our jurisdictions and further afield.

Ogier has strong relationships with many of the major international law firms. The team regularly guides multi-jurisdictional organisations through a wide range of corporate transactions including listings, mergers, acquisitions, management buy-outs, and restructurings. We offer legal advice

throughout the insolvency process and its impact on pension and incentive arrangements.

### Our services

#### Employee benefit trusts

Establishing employee benefit trusts for the purposes of holding shares or options, either for warehousing purposes or to enable innovative and attractive incentive arrangements to be put in place for the executives of our clients.

#### Corporate

We frequently work alongside other teams within Ogier involved in advising in respect of existing or new employee incentive plans where companies are being sold or are involved in a takeover.

#### Pensions

Advice on pension schemes established under Article 131 or Article 131A of the Income Tax (Jersey) Law 1961 as amended. We have advised also on the establishment of more niche pension arrangements such as QROPS or QNUPS.

Ogier is a member of the IPEBLA (International Pension and Employee Benefit Lawyers Association) and ESOP (the Employee Share Ownership Centre). As members of the Jersey Pensions Association, we have been very involved in the recent changes to, and the revamping of, Jersey's pensions law.

## Case studies

### **Drafting a trust deed**

We drafted a Guernsey law trust deed to establish a trust to hold certain assets of a PRC entrepreneur, including the shares in a BVI company which was the entrepreneur's principal holding company.

The trust deed included reserved powers which allowed the PRC entrepreneur to retain the power to make investment decisions over the shares in the BVI holding company even after those shares were transferred into the trust.

### **Reviewing a trust deed to protect client**

We reviewed a Jersey law trust deed drafted by a trustee and advised the PRC settlor of the trust on his rights and powers under the trust deed and how the trust deed could be amended to better protect the interests of the settlor and the beneficiaries of the trust against possible future claims from creditors.

### **Drafting a will**

We drafted a BVI law will covering the shares in three BVI companies held by a PRC entrepreneur and which were critical to the ownership of his business.

The terms of the will were very specific in order to ensure that the shares in the BVI company passed to certain specific members of the entrepreneur's family in certain proportions exactly as the entrepreneur wanted.

### **Obtaining probate**

We drafted all the documents necessary, provided all the relevant advice and dealt with the relevant BVI court application for the executor of the estate of a deceased PRC businessman in

respect of the BVI will of that deceased businessman in order for the shares in several BVI companies owned by the deceased businessman to pass to his wife and children in accordance with the terms of his will.

Our involvement was necessary to ensure that the shares could be transferred and we ensured that this happened as quickly as possible to allow the continued smooth operation of the companies.

### **Pre-IPO planning – drafting a BVI law employee benefit trust (EBT or ESOP)**

We assisted the PRC founder of a technology business as part of the pre-IPO planning for that business.

The PRC founder considered that retaining key staff would be critical to the success of the IPO and the business. To assist with retention of key staff, we provided advice and drafted all the documents necessary to establish and operate an employee benefit trust (EBT).

Under the EBT, certain key staff of the business could be invited to become beneficiaries of the EBT and they would be eligible to receive shares in the Cayman company which was to be listed if they achieved certain business targets and remained as employees for a certain period after the listing. In this way the relevant employees were incentivised to remain with the company and contribute to its success in the period before and after the IPO.

We also worked with colleagues in the corporate team of Ogier who advised the client of the Cayman law aspects of the IPO of the Cayman company.

### **Restructuring**

Our client was a PRC entrepreneur and had established a Cayman trust for the benefit of him and his family several years previously.

We advised our client and drafted or reviewed all the documents necessary in order for our client to transfer his shares in a BVI company and the US\$200 million debt secured over those shares to the trustee of the Cayman trust.

This involved advising on a combination of trust, company, and banking and finance law issues and working with our client, his PRC advisors as well as the lending bank and their advisors.

### **Private trust company (PTC)**

We assisted a PRC businessman in establishing BVI private trust company (PTC) to act as trustee of a Jersey law trust for the benefit of him and his family.

The client wanted to establish a trust in order to hold some of his investment assets worth over US\$50 million and to benefit his family, but he wanted to ensure that his family members retained involvement regarding decisions over those assets.

We assisted the client in establishing a BVI PTC to be the trustee of the family trust. The board of directors of the PTC comprises a number of members of the client's family (as well as some professional advisors and trusted associates) and that provides the mechanism by which the family is able to be involved in decision making regarding the trust and the assets it holds.

We assisted the client by drafting the Jersey law trust deed, establishing the PTC and advising on the BVI and Jersey legal and regulatory issues relevant to operating the PTC.

### **Family governance**

We advised a PRC business founder and his adult children in establishing and operating a Guernsey foundation.

The purpose of the foundation was to hold business assets of the family as well as certain personal assets (including a valuable art collection and other financial assets) worth in total approximately US\$1 billion for a number of purposes including to fund the education, travel, medical and other living costs of family members, to finance future business ventures of family members (i.e. an internal family venture capital fund), and to fund gifts to charity.

We drafted the charter and rules of the foundation and also regulations to govern the operation of a number of different committees who would advise the foundation on its various activities. This work required us to liaise very closely with the family members and their lead advisor, to understand exactly what they were seeking to achieve and to find ways to balance the competing interests and needs of the family members.

## Contact us



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Jersey  
London  
Luxembourg  
Shanghai  
Singapore  
Tokyo

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. We regularly win awards for innovation, client service and quality. Regulatory information can be found at [ogier.com](http://ogier.com)