

Private Client Services

Middle East



Our Middle East team

Hawksford's Middle East team has gained extensive experience having worked with families and their advisers in the region for many years.

We manage over 170 client relationships across the GCC and Middle East, administering a wide range of asset classes and providing wealth structuring services of the highest standard.

Members of the Hawksford team frequently visit the region to meet with clients and their advisers in order to nurture existing relationships and to develop new contacts.

Typical clients

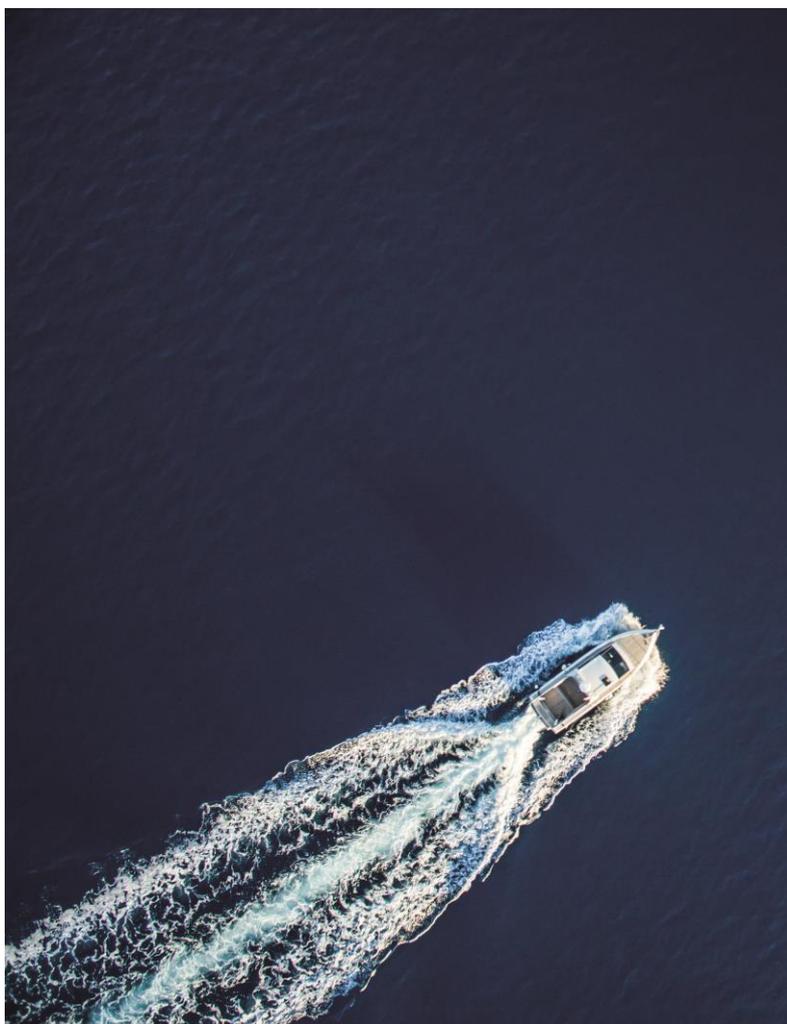
- Members of prominent families
- Senior business leaders and owners across the region
- Entrepreneurs with a portfolio of international businesses and investments



Services offered

The Middle East team has experience and expertise in creating, managing and administering the following structures:

- Traditional, reserved powers, discretionary and purpose trusts, including provision of trustees for all forms of trusts and the provision of trustees for Sharia compliant trusts.
- Company formations, including, Limited Partnerships in various locations; including Jersey, Singapore, London and Hong Kong. In addition, we can administer LPs and companies from many other offshore jurisdictions through our network of agents in specific jurisdictions.
- Private Trust companies.
- Managed Trust companies.
- The management of all assets within the structures we create via the provision of directors, officers and authorised signatories.
- Access to 'best of breed' global and boutique investment firms and managers.
- Access to residential and commercial property finders in prime London and further afield.
- Hawksford has responsibility for structures which hold varying types of luxury assets, including super yachts, vintage cars and artwork.
- Executor, Wills & Probate.
- Philanthropy.



“James is extremely personable and empathetic to client objectives. He achieves that close nexus with clients whilst at the same time being diligent to meet the legal and regulatory framework requirements for the administration of robust trust, foundation and company structures.”

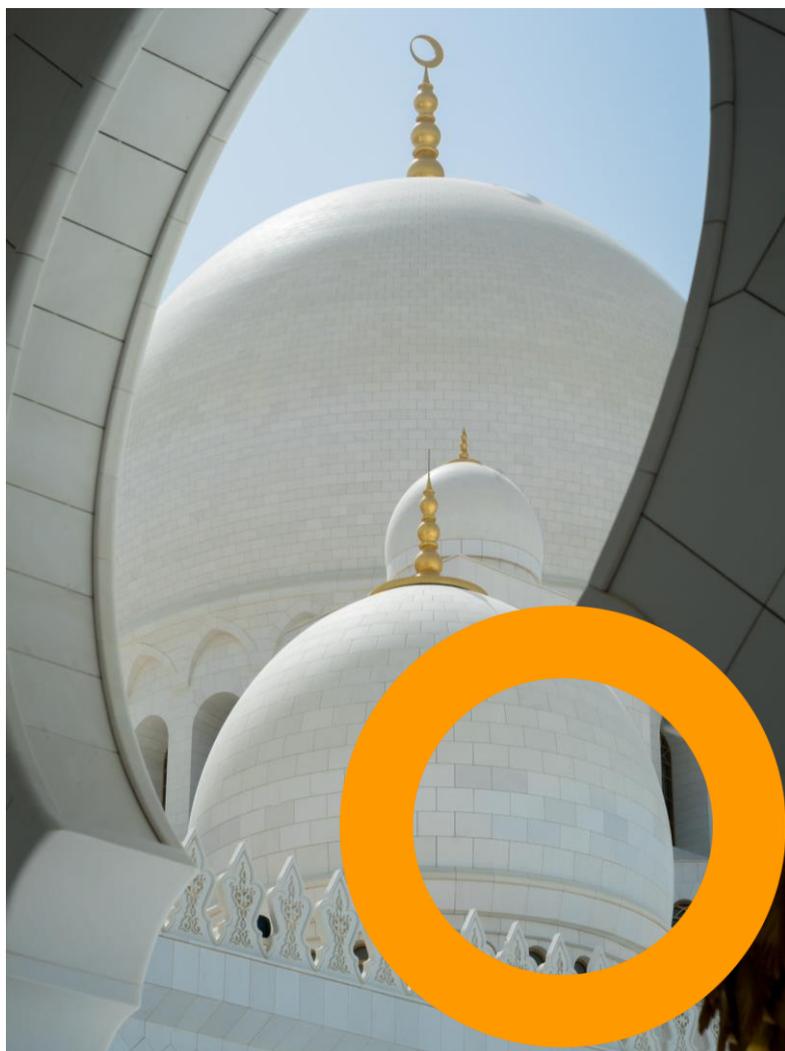
Client of Hawksford

Case Studies

Multi-generational international family

A multi-generational international family with a significant dollar mixed asset portfolio of personal and investment assets. Hawksford provides a full suite of capabilities from both our Jersey and Asia offices.

Hawksford adds value to this client by attendance at investment committees, introductions to advisory networks, assessment of risk and suitability of investments, management of family conflicts and guidance on family governance issues.



Multi-million dollar assets

A long-standing client of Hawksford who is a high profile UHNW international family with a multi-million-dollar global asset portfolio. Assets include a number of different international businesses and investments. Hawksford provides a private family investment office for five generations of family residing all over the world, this includes

facilitation of financing, full suite of corporate services, fiduciary services for private trust companies and underlying trust structures.

Hawksford adds value to this client through oversight and monitoring of family investments to ensure their investment objectives are being met, managing complex family dynamics and issues, and

provision of in-house legal services for a wider range of corporate and family issues. Hawksford also handles complex cross-border tax issues and provides day-to-day support and contact for financial and non-financial matters to the family.

Philanthropy focus

A high profile UHNW individual with a strong philanthropic focus. Assets include international investments with a focus on pioneering development and research. Hawksford provides a family office style service for this client, including our full suite of corporate services and fiduciary services for the private trust company and underlying trusts.

Hawksford adds value to this client with oversight and monitoring of investments, risk and suitability assessments, focus on meeting transactional deadlines and speed of execution as well as general day-to-day support.

Wills & Probate

Our Wills & Probate team has prepared Jersey Wills for a client with a company structure owning trading businesses as part of wealth planning.

Charitable trusts

Hawksford acts as trustee for a number of charitable trusts where significant contributions are made to a wide variety of charitable causes, both small and large.



Why clients use Hawksford

Our people are highly trained, with a wide range of experience, and are trusted to provide a reassuringly personal service to international multi-generational families.

We are able to provide the following wealth structuring solutions for our clients:

- Family office – A single point of contact to manage large families' wealth, family governance, financial/investment education and philanthropy co-ordination
- Estate planning
- Succession planning
- Asset protection
- Family governance
- Sharia compliance
- Philanthropic structures
- Luxury assets
- Consolidation / corporatisation of wealth, domestic and offshore
- Confidentiality
- Cross-border transactions and administration
- Reputational reasons pre IPO
- A trusted professional to oversee and assist with clients' affairs
- Creation of Wills as part of wealth planning and probate administration of estates

What does Family Office mean?

We build unique family office solutions based on the goals of each individual family; as the circumstances, needs and expectations of every family are unique, so must our services be.

objectives you set, including large global structures holding a variety of assets, Sharia-compliant structures and the support of philanthropic interests.

Working closely with you and your advisers, Hawksford can meet the

What does Succession mean?

Simply put, we will work with you on the creation of a definite plan for managing your wealth while you are alive and distributing it after your death. It encompasses three distinct elements:

- Wealth accumulation
- Wealth preservation
- Wealth distribution

Alternatively, it can be used to ensure the smooth transmission of assets from one generation to another, right through to sophisticated arrangements for the long-term preservation of family wealth, including business assets across jurisdictions and across generations.

Succession planning can range from Hawksford simply holding assets in trust, so as to avoid the delays, expense and publicity of probate applications.

Value that is recognised

Our award-winning teams are recognised by peers and industry bodies for our technical skills and impeccable client service.



Some recent award wins include:

- Family Office of the Year, Citywealth International Financial Centre Awards 2020
- Trust Company of the Year, Citywealth Magic Circle Awards 2019
- Trustee of the Year by Citywealth Magic Circle Awards 2019 – Darren Kelland, Global Head of Private Client
- Runner up as Family Office of the Year at Citywealth Magic Circle Awards 2019
- EPrivateClient Top 25 Trust Company 2019, 2018, 2017, 2016, 2015
- Shortlisted for Citywealth Outstanding Individual of the Year – Michael Powell (2020)
- Shortlisted for ‘Independent Trust or Fiduciary Company’ in the Wealthbriefing European Awards 2019
- Shortlisted for ‘Probate Provider of the Year’ at the British Wills & Probate Awards 2018
- EPrivateClient Top 50 Most Influential Practitioners - Darren Kelland (2018), Michael Powell (2017)
- Shortlisted for Wealthbriefing’s Independent Trust Company of the Year for the GCC Region in 2016 and 2015

Contact us

For more information about our Private Client services, please get in touch with any of the team below.



Darren Kelland

Global Head of Private Client

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Darren is an experienced guardian when it comes to the assets and financial affairs for UHNW individuals and families. He has substantial experience as both a trustee and a director on complex trust structures, family offices and multinational companies, and has provided administration services for high profile and influential individuals, entrepreneurs and long-established families with considerable private capital and varied business interests.

Darren leads the management and growth of our Private Client services. He is responsible for our team of specialist administrators who are discreet, professional and focused on the long term and individual needs of our clients. He expects our team to deliver nothing but the best service.



James Howe

Client Director, Private Client

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James has been working within the offshore fiduciary services sector since 1980, specialising in wealth planning, including planning for UK resident non-dom clients. This encompasses family governance, and estate and succession planning to protect the family wealth for the benefit of second and third generations. James has many years of experience in administering real estate investment, property in the UK, holding landed estates, works of art, private equity type investments, and other asset and investment portfolios.

James has been instrumental in establishing Hawksford's strong Middle East focus and regularly visits clients there, or in their London offices.



Vicky Mills

Director, Private Client

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Vicky works within the private client team to establish and administer a variety of wealth structuring vehicles and is currently responsible for the oversight of a team of private client administrators who manage a diverse range of assets for HNW and UHNW clients from around the globe.

Vicky has specific expertise in dealing with some of the world's most prominent families in the Middle East and Asia and has a strong focus on client care and service. Vicky has also contributed to the implementation of professional policies and procedures and provides regular strategic input regarding billing, accounting, client care and performance reviews.



Wendy Inns

Director, Private Client

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Wendy brings vast knowledge and expertise in the incorporation and ongoing administration of the full range of structures for private clients including standalone trusts and companies and complex Private Trust Company arrangements for multiple family members.

She has worked with a diverse range of assets, is well versed in the reorganisation of client structures, and enjoys working closely with clients and their advisers to implement solution-driven planning.



Ian Vieira

Trust Manager

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As a Private Client Manager, Ian is responsible for a team of six administrators as well as delivering expert private client services to his own wide base of clients. Ian provides support to clients around the world, with experience and interest in supporting clients in the Middle East.

Ian has expertise in real estate and specialist investments, having managed the acquisition and sale of properties in the UK and Dubai, and having delivered a complex specialist investment strategy in the MENA region. The structures that Ian manages involve a wide range of private trust companies and other special purpose vehicles based in Jersey, Guernsey, England, Dubai and Jebel Ali Free Zone.

Ian regularly travels to the UK to meet with clients and their advisers.

Ian sits on Hawksford's Policies and Procedures Committee, lending his expertise to reviewing existing policies and ensuring they continue to be appropriate within the ever-changing regulatory environment.

Thinking beyond tomorrow

**We help clients to make the most of
their business decisions and wealth.**

We take on the burden of regulatory, financial and tax compliance, and corporate governance to enable our clients to focus on managing their business interests and creating wealth.

We've helped families to take care of their wealth, entrepreneurs to succeed, multinational companies to transact and operate, and funds to maximise their returns.

www.hawksford.com

This document is for informational purposes only. It does not constitute advice and should not be relied upon as such. Please seek professional advice appropriate to your particular circumstances or requirements. If you would like further information on any matter raised by this document please contact us.

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