

# Luxembourg as a Private Wealth Destination

Luxembourg has the second largest fund industry in the world and has developed a broad range of sophisticated investment and succession planning structures for private wealth management.

By responding to the needs of individuals for flexibility with regulatory supervision, Luxembourg now provides a world-leading platform for asset protection, international investments and estate planning.

## A gateway to Europe

Luxembourg is a jurisdiction of choice for asset managers and family offices looking to access the EU. However, investing in Europe demands a deep knowledge of the compliance and regulatory landscape. Our professionals have that technical expertise, as well as extensive experience of supporting investors from around the world.

## Why Luxembourg?

- Second largest global investment centre
- Sophisticated service infrastructure
- Triple A ratings (by 3 top agencies)
- Unique regulative environment
- >100 SFOs and >86 MFOs

## Why IQ-EQ?

- Deep experience with HNWI and family offices
- Multi-asset class specialists
- Risk, compliance and reporting experts
- Governance and asset structures
- ESG and philanthropic services

### How we help

Peace of mind comes with knowing your unique investment, asset and succession requirements are structured to ensure your family's wealth is optimised and protected for future generations.

### Private funds

Luxembourg is equipped to respond to the needs of individuals for private funds through a variety of both regulated and unregulated private fund vehicles across all asset classes and with access to Luxembourg's large network of double taxation as well as bi-lateral investment treaties. The jurisdiction provides the flexibility to efficiently and compliantly hold and preserve various types of family asset interests thereby further enabling succession planning. IQ-EQ can help with the establishment, administration, compliance and accounting for all types of private funds structures.

### Family holding companies

Investing in assets in Europe, especially private equity and real estate, remains cornerstone of wealth management structures in Luxembourg, which offers a stable legislative environment to structure investment in real assets. IQ-EQ can take care of all your outsourced administrative, compliance, back office needs, reporting and family office holding structures requirements.

### Co-invest platform

Family offices and UHNW have been increasing their club investing and co-investing activity. Luxembourg has also recently amended its Securitisation Act 2004 to allow the establishment of a securitisation vehicle that can be created as segregated compartments without being structured as a fund. This will make securitisation vehicles more interesting for family offices and a good option for co-investing. IQ-EQ can assist with the incorporation, administration, accounting and reporting function of the securitisation vehicle.

### Data

Improve operational efficiency with our data specialist team. We analyse and increase efficiencies in cash management, budget and forecasting, accounting and controlling and corporate and compliance.

### Carried interest

Executives and managers in alternative asset funds are normally incentivised via their carried interest in the underlying funds. We help you manage carried interest efficiently and calculate waterfalls and distributions to ensure it is in line with the relevant tax planning and includes both the carried interest paid out and the carried interest deferred by the asset manager for future payment. We also service other wealth holding structures in Luxembourg.

## About us\*

We are a leading investor services group employing 4,000+ people across 24 jurisdictions worldwide. Our private wealth, trust, fiduciary, private funds, governance and administration professionals have the experience and expertise to support you and your family.

## Key contacts

If you like to find out more, contact Richard Behmer. He would be delighted to speak with you.



## Richard Behmer

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Luxembourg

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\*Information correct as of 3 February 2022

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