Private Wealth Services

Why IQ-EQ

The experience that IQ-EQ® has as a fiduciary working with U.S. domestic only clients, foreign clients with U.S. structures, foreign only clients and U.S. clients with foreign structures.

- This is a rare find. We have a deep well of experience worldwide to draw upon, to better support you and your clients. This also means that we are uniquely able to coordinate and provide consistency of service delivery, administration, communication and reporting from the jurisdictions you and your clients choose

Our experience with non-traditional and alternative investments.

- We welcome investments into trust that goes beyond the typical liquid portfolio investments and some types of real estate that most trust companies allow. We are experienced with hedge funds, private equity, venture capital holdings, shares of private operating companies, the family compound, commercial real estate, classic cars, yachts, aircraft and more

A team with extensive trust administration expertise, as well as broad business experience.

- Knowledgeable, but also practical, user friendly and responsive
- Supported with additional resources, bench strength and expertise from IQ-EQ, the global leader in independent fiduciary services

A clear, practical new business take on process.

- We define what KYC is required up front, and expedite the take on process, so you and your clients can meet your goals and timelines for structure establishment

The scale of our offering worldwide - 25 locations, with the full range of fiduciary and corporate services.

- We are uniquely able to flex and evolve with your clients as, over time, their family members change jurisdictions, and seek specific regimes and specific structures to support their planning objectives. This also means that the clients - and you - can establish a truly long-term and productive relationship with IQ-EQ

We do not manage money and do not provide legal advice or accountancy services, worldwide.

- We complement the relationships that clients have with their trusted advisors; we do not compete with them

IQEQ

Why South Dakota and New Hampshire

Two high quality U.S. trust jurisdictions to choose from.

- South Dakota, one of the top domestic jurisdictions with progressive and modern trust legislation, and a go-to for asset protection
- New Hampshire, also a top jurisdiction, with the added advantages of proximity to major East Coast cities, broader PTC legislation and a dedicated Trust Court to hear and expedite trust matters

No state income tax.

- South Dakota and New Hampshire do not impose state income or capital gains taxes on trusts, enabling the value of the trust for future beneficiaries to compound faster

Progressive, modern trust law and flexibility.

- Families do not need to reside in the state to access the benefits of South Dakota and New Hampshire trust law
- Nonresidents can relocate existing trusts or establish new trusts in either jurisdiction
- Trusts may exist in perpetuity in either state, supporting the grantor's goals for family wealth preservation
- Protects assets from the reach of creditors
- Records remain private for all court matters involving trusts
- Family members and/or trusted advisors can make decisions about the investment of trust assets
- A family can appoint an independent third party to function as protector, with powers that may include replacement of the trustee, change of trust situs veto, or approve proposed trustee actions or modify some trust terms as the needs of the family change. IQ-EQ acts as the administrative trustee, providing expert operational management, compliance and trust administration services

About us*

We are IQ EQ®, a leading investor services group employing over 4,750+ people across 25 jurisdictions worldwide. We bring together a rare combination of global expertise and deep understanding of the needs of our clients. We have the know-how and the know-you to support fund managers, global companies, family offices and private clients.

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*Information correct as of 23 June 2023

IQ EQ® is registered in the U.S. Patent and Trademark Office

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Find out more
www.iqeq.com

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