



J T C P R I V A T E O F F I C E



T I M E — I S T H E N E W — L U X U R Y

A P R I V A T E O F F I C E — T H A T W O R K S W I T H Y O U

Our clients want more than just a service provider. Our clients want a trusted partner as committed to achieving their goals as they are.

JTC Private Office offers a holistic service built around the unique needs of each individual or family, regardless of their

wealth – it's more a matter of priorities. We make clients' lives easier by providing a single point of contact through which clients can access our global network of specialists. To keep it simple - we save our clients time.

O U R O B J E C T I V E — C R E A T I N G T I M E ... F O R Y O U

JTC has been looking after families for over 30 years and has over 900+ experts in 23 offices globally providing professional administration services through structures including trusts, foundations, funds and companies. JTC Private Office allows clients to access these services personally, without the need to set up an entity or structure.

JTC Private Office provides a single point of contact where multiple services are required, both within and external to JTC. This service element is supported by a cutting-edge technology platform that keeps clients in control and allows them to access their information from their smartphone or tablet.

Whilst the amount of expertise available globally is now unprecedented, keeping track of advisers is often a full time task in itself. Our professional experts assist clients

in obtaining the best and most cost effective service from independent providers. In turn we support those advisers by ensuring they have all the resources they need and provide co-ordination to make sure roles do not overlap unnecessarily.

For more established wealth and where advisers are working in-house, our service evolves to support the wider infrastructure including HR, Premises, IT, Compliance, Communications, CFO functions and Administration on a business to business basis. We help individuals and families ensure their private office achieves the highest levels of professionalism and corporate governance.

Our independence allows us to focus on our client's requirements from a conflict-free position ensuring the highest level of client care.

EVERY STEP – – OF THE WAY –

JTC PRIVATE OFFICE: CORE SERVICES

The JTC Private Office service is designed to facilitate a whole range of individuals, families and established family office's needs. Therefore the services that we can offer are extensive but then also tailored accordingly to each client's specific requirements.

Your designated JTC Private Office representative acts as a single 'point of contact' - you let us know what you need and we take care of the rest!

We have an extensive professional network both in house at JTC and externally across the globe. Our network is therefore your network.

Examples of the types of services* we can offer are listed below:

- ▶ Trust, foundation and company services including administration, accounting, consolidated reporting, virtual CFO as well as bill payments and banking support.
- ▶ Business and family succession including governance, estate planning, philanthropy and participation on family committees or as an external director
- ▶ Consolidated reporting and document management utilising our multi-award winning technology Edge
- ▶ Investment support, selection and supervision
- ▶ Our 'Manager of Managers' role ensures full oversight and control of out-of-house expertise, with professional advisors working to maximise efficiency (appropriate fees and access to information)
- ▶ Our support services include fleet management, concierge, relocation and immigration, payroll and HR/staff management, security, IT support, property management, compliance, art advisory, luxury asset purchases, tax compliance and general or philanthropic/charitable project management.

*Whilst JTC Private Office is the primary contracting party for the services listed above, any element of the services may be provided by other entities within the wider JTC Group of companies or selected third parties as may be instructed by JTC.



JTC Private Office provides a single point of contact where multiple services are required, both within and external to JTC.

OUR SENIOR EXPERT GENERALISTS FACILITATE, ADVISE AND COORDINATE

- ▶ Access to the JTC in-house network of over 900+ professionals
- ▶ Use of external practitioners and services providers, i.e. lawyers, bankers, investment & tax advisers, insurance brokers, trustees and accountants
- ▶ Specialist support for property, art, life style assets, migration, charity projects and others.





EDGE _ YOUR LIFE IN ONE PLACE _

Underpinning JTC Private Office is our purpose-built, fully customisable and multi-award winning online platform, Edge. Through an app on any smartphone or tablet, Edge provides an oversight across all asset classes, stores related documents and presents easy to understand governance charts. Edge is not restricted to holding

financial information, with clients having the ability to have their children's school results and artwork stored on the portal. External advisers can receive access to specific sections of the Edge portal at a client's request. Similarly, younger family members can be given access to the parts that are relevant to them.



WHY WORK WITH JTC PRIVATE OFFICE?

- ▶ Maximise your most precious resource - time
- ▶ Trust, confidentiality and service excellence
- ▶ Independence
- ▶ 24/7 access to a global network of expertise
- ▶ Consolidated reporting via market-leading technology
- ▶ No conflict of interest



MEET THE TEAM

NIGEL LE QUESNE

CHIEF EXECUTIVE OFFICER

► nigel.lequesne@jtcgroup.com ► +44 1534 700 000



IAIN JOHNS

GROUP HEAD OF PRIVATE CLIENT SERVICES

► ian.johns@jtcgroup.com ► +44 1534 816 251



MATTHIAS BELZ

HEAD OF JTC PRIVATE OFFICE

► matthias.belz@jtcgroup.com ► +41 22 596 33 23



REBECCA BETTANY

DIRECTOR - JTC PRIVATE OFFICE

► rebecca.bettany@jtcgroup.com ► +44 1534 816 269



Our larger JTC Private Office team are spread around the globe throughout Africa, Americas, British Isles, Caribbean, Europe and the Middle East.



JTC Group entities that carry on regulated business are (respectively): regulated by the British Virgin Islands Financial Services Commission; the Cayman Islands Monetary Authority; the Guernsey Financial Services Commission; the Jersey Financial Services Commission; the Commission de Surveillance du Secteur Financier and the Ordre des Experts-Comptables (Luxembourg); the Financial Services Commission (Mauritius); De Nederlandsche Bank (Netherlands); the South African Financial Sector Conduct Authority (FSCA) as an authorised financial services provider; chartered and regulated to provide trust services by the South Dakota Division of Banking in South Dakota (USA); a member of l'Association Romande des Intermédiaires Financiers (Switzerland)*; licensed by the Isle of Man Financial Services Authority; registered with the Dubai Financial Services Authority, authorised by the Department of Justice and Equality of the Republic of Ireland to operate as trust or company service provider and authorised and regulated by the Financial Conduct Authority (UK).

For our full website disclaimer, please visit: www.jtcgroup.com/disclaimer. For more information about JTC Group, its offices and alliances please visit: www.jtcgroup.com. For JTC Group's full terms of business, please visit: www.jtcgroup.com/terms-of-business.

* l'Association Romande des Intermédiaires Financiers (ARIF) is a self-regulatory body approved by the Swiss Financial Market Supervisory Authority (FINMA) for the supervision of financial intermediaries covered by Article 2 para.3 of the Swiss Federal Law on Combating Money Laundering and Financing of Terrorism in the Financial Sector (LBA). ARIF is also recognized by FINMA as a professional organization for the outlating of rules of conduct relating to the exercise of the profession of independent asset manager within the meaning of the Swiss Federal Act on Collective Investment Schemes (CISA).