

Fiduciary Services

At a glance

Entities

Fully Discretionary Trusts
Private Trust Companies
VISTA Trusts
Purpose Trusts
Charitable Trusts
Employee Benefit Trusts
IP Structures
Orphan Structures
Foundations

Jurisdictions

BVI
Guernsey
Mauritius
Hong Kong
New Zealand

Assets

Property
Aviation
Marine
Artwork
Collectibles
Private Company Shares
Equity Portfolios
Cash at Bank

Guiding Principles

Newhaven is privately owned and genuinely independent. We are not subject to the conflicts of interest that bank owned service providers are or the ‘private equity squeeze’ that is increasingly prevalent in our industry. Newhaven has been providing trustee services for over 20 years and understands that with the implementation of enduring structures, clients really value long-term relationship continuity and a highly personalised service.

Newhaven provides services under the guiding principles of independence, freedom from conflict of interest, absence of bureaucracy, high levels of corporate governance and the provision of superior personalised service delivered by experienced industry professionals.

The driving principles on which the business was founded and continues to be managed include:

- focus on developing long lasting, high-quality business relationships with all clients and their advisors.
- staffed by long-standing industry professionals with complementary skill sets (including in legal, accountancy and banking).
- avoidance of conflicts of interest.
- high standards of corporate governance.

Asset classes

Newhaven administers over £400m worth of assets for clients ranging from small trusts holding individual pieces of artwork to larger trusts administering property portfolios in excess of £25m.

Newhaven has experience in administering trusts across all of the major asset classes, including: Property, Aviation, Marine, Artwork and Collectibles and also has significant experience in holding private investments and equity portfolios, with over £200m of invested assets.

‘Preserve, protect
and enhance’



Fiduciary Services

Business Introducers

Newhaven's Business Introducers are predominantly private client tax advisors. We seek to work in concert with our client's professional advisers implementing and managing structures for the whole spectrum of private client needs including:

- Estate / Succession Planning
- Pre-emigration/Immigration Planning
- Tax Planning
- Family Governance
- Asset Protection
- Family Wealth Management
- Pre-IPO Structuring
- Intellectual Property
- Real Estate
- Political Risk Management
- Forced Heirship Avoidance

Our clients comprise mostly UK Resident Non Doms and Non Resident Non Doms with investment interests in the UK. We have clients from all four corners of the globe and therefore are able to understand local cultural sensitivities, wherever our clients are from. We work with both High Net Worth Individuals with multi-generational family interests and with budding entrepreneurs with sudden exposure to dramatic wealth.

Trust Entities

Newhaven possesses the capability and expertise to provide the full suite of fiduciary tools across a number of internationally reputable jurisdictions and would be delighted to consider accepting appointments as trustee (or co-trustee) of all types of inter vivos settlements and Will Trusts or as successor to an existing trustee.

Protectorships

In response to growing demand Newhaven is now able to provide a professional Protector service. As well as performing those duties reserved for the Protector in an informed, independent and professional manner, the objectives are to assist:

- Beneficiaries, by remaining fully aware of their circumstances and requirements; by asking appropriate questions of trustees and other advisers and by ensuring the receipt of appropriate and understandable reporting.
- Trustees, by providing better and more comprehensive information upon which they can base their decisions and plan the management of assets.
- Legal, tax and other professional advisers by involving them at all appropriate times.

For more information on our private client capabilities, please contact your usual client service administrator or one of the experts listed below.

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