



# ALVAREZ & MARSAL PRIVATE WEALTH SERVICES

A&M's integrated private wealth service team assists clients with a unique solution to private wealth planning, which combines our specialist expertise to implement strategies across our diverse spectrum of service offerings. Our services are differentiated from the market and are designed to be both Proactive to achieve optimal wealth outcomes and Reactive to ensure that your wealth is adequately protected.

## OUR PROACTIVE SERVICES

### Tax

#### Tax strategy and planning



- Devising tax efficient strategies to protect generational wealth and maximize returns.
- Working with trustees on the set up of trusts and ensuring it is tax efficient.
- Estate planning to minimize tax impact of passing down assets.
- Immigration and pre-arrival planning for families to minimize tax leakage post-migration.
- Devising tax effective structures for and implementing the set up of family offices and obtaining available tax incentives.
- Ongoing compliance services to ensure all tax documentation and filing requirements are correctly discharged.

## OUR REACTIVE SERVICES

### Estate Services

#### Estate Administration and Management



- Bridging between the various stakeholders and taking an unbiased approach to resolve disputes.
- Preserving and managing the asset portfolio of deceased estates.
- Managing the financial affairs of mentally incapacitated persons.
- Carrying out realisation and distribution of assets in accordance with the will of the testator or power conferred by the court or statute, if intestacy.

### Disputes

#### Family, Matrimonial and Trust Disputes



- Identifying and evaluating financial information for the preparation of Form E / schedule of assets/liabilities.
- Conducting valuations of the businesses/companies/shares held within the family or by the trust.
- Analysing financial reporting and conducting forensic analysis for suspicious or questionable transaction activities.
- Undertaking tracing exercises to identify dissipated/hidden assets and assisting in the recovery of those assets.
- Acting as expert witness and providing litigation support.
- Regulatory compliance and risk management for family offices/businesses.
- Preservation of data necessary for legal proceedings.

### Forensic Technology

#### Investigation and eDiscovery Services



- Digital Investigations – Defensibly tracing the digital footprints of internal and external threats.
- Electronic Discovery Management – Ensuring the defensible satisfaction of our clients' preservation and discovery obligations.
- Applied Data Analytics – Leveraging data to enable insightful decision-making and business transparency.
- Global Cyber Risk Service – Proactive and reactive protection from cyber threats.

Our team includes experts from a diverse range of unique professional disciplines including accountants, tax advisers, insolvency practitioners, forensic accounting professionals and disputes specialists, each dedicated to providing bespoke and tailored solutions to you and your family. Our practice is designed to compliment and work with your advisers, not compete with them. We accomplish our objectives by providing a one-stop holistic solution to you through connecting, coordinating, overseeing and collaborating with a broad network of professionals that understand where you've been and where you want to go.

A&M has comprehensive regional and global coverage, providing you with access to experience in over 50 jurisdictions. Our professionals are experts at communicating in numerous languages and guiding our clients through complex regulatory structures and local nuances.

## REPRESENTATIVE EXPERIENCE

### 1 Tax strategy and planning

A&M assisted US citizens running an entrepreneurial business in establishing US onshore trusts to manage their estate tax.

A&M provided constant support on the project through assisting the entrepreneurs (the grantors), US onshore trusts and the beneficiaries of the trusts in discharging their US tax compliance requirements, including managing implications in the areas of Estate and Gift Tax, Income Tax, etc.

In addition, A&M has led projects to centrally coordinate multi-discipline support from law firms, trust companies, bankers and insurance companies/brokers to provide one-stop strategic wealth planning services.

### 2 Estate administration and management

A&M acted as court appointed administrator of deceased estates and committee of mentally incapacitated person in respect of their financial affairs.

A&M has assisted clients in asset tracing and recovery of assets in different jurisdictions, in coordination with the A&M Disputes & Investigations teams in different countries.

A&M worked impartially with a view to preserve and ascertain the value of the estate when there are allegations of dissipation or impropriety.

### 3 Family and matrimonial disputes

A&M was engaged to act as a company valuation expert witness in connection with a dispute amongst members of a prominent family in Hong Kong SAR. The dispute arose following the death of a senior family member and the subsequent battle over ownership and control of certain real estate and business interests in Mainland China.

A&M considered the appropriate basis, approaches and methodologies for the valuation, as well as considerations to account for the nature of the interest being valued and identifying any unrecorded assets or liabilities.

## FOR MORE INFORMATION, CONTACT ONE OF OUR EXPERTS:



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## ABOUT ALVAREZ & MARSAL

Companies, investors, and government entities around the world turn to Alvarez & Marsal (A&M) for leadership, action and results. Privately held since its founding in 1983, A&M is a leading global professional services firm that provides advisory, business performance improvement and turnaround management services. When conventional approaches are not enough to create transformation and drive change, clients seek our deep expertise and ability to deliver practical solutions to their unique problems.

With over 9,000 people providing services across six continents, we deliver tangible results for corporates, boards, private equity firms, law firms and government agencies facing complex challenges. Our senior leaders, and their teams, leverage A&M's restructuring heritage to help companies act decisively, catapult growth and accelerate results. We are experienced operators, world-class consultants, former regulators and industry authorities with a shared commitment to telling clients what's really needed for turning change into a strategic business asset, managing risk and unlocking value at every stage of growth.

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