



## SAFFERY CHAMPNESS, GUERNSEY

***Saffery Champness***  
REGISTERED FIDUCIARIES



## SAFFERY CHAMPNESS, GUERNSEY

The Guernsey office of Saffery Champness is one of the largest independent providers of fiduciary services on the Island, meeting its clients' needs for confidentiality and the preservation and enhancement of their wealth through the formation and administration of offshore trust and company structures, and the provision of ongoing advisory and compliance services.

Assets under our administration span a wide range of classes totalling billions of pounds, ranging from quoted and unquoted investments through to private and commercial property and many other types of alternative investments. Unlike some trust companies, we do not have restrictions on the types of assets that we will manage, but will consider each client's individual requirements. In addition to fiduciary services we are able to provide a full range of local accounting and tax services.

We are practised at operating alongside other professionals as client needs dictate and in many cases work with our clients to create integrated solutions across their related financial and business affairs. With the additional support of our firm's mainland practice and through our membership of international association Nexia International, our clients are able to access considerable expertise across the globe.

Our presence on Guernsey was established in 1977 with a single resident Partner and has grown rapidly since then to become a substantial practice on the Island, employing approximately 100 people.

## Guernsey

The Bailiwick of Guernsey consists of a number of Islands and is located in the Bay of St Malo. The Islands have one of the most stable and oldest Governments in the world and a benign tax environment with no capital, inheritance or sales taxes. Guernsey is a major international finance centre with a long history of fiscal independence and has a sophisticated infrastructure of banks, accountants, law firms and investment managers. Trust and company legislation is constantly monitored and updated to ensure that the Island maintains its competitive edge and has the added attraction of being industry, rather than Government, led. It is this combination of factors which has led to the remarkable growth in the Island's finance industry.

## Services to Private Clients

Saffery Champness have been advising private clients in the UK for over 150 years. The Guernsey Office has built on this tradition and specialises in providing trust and company services to wealthy individuals and families from all over the world.

Our clients require our services for a wide variety of reasons which may include estate planning, asset protection or as part of the tax efficient structuring of their affairs. As an independent firm we can source support services such as investment management, banking arrangements or other wealth management facilities which will best suit each individual client. Our staff are professionally qualified with extensive experience, including technical and language skills, and we strive to provide a personal, efficient and added value service. We are proud of our employees and with low staff turnover always endeavour to build long standing relationships with all of our clients

## Services to Corporate Clients

In addition to providing trust and company management services to private clients our office also establishes structures for corporate clients. Such clients may require companies managed in a tax neutral jurisdiction for international financing purposes or trusts for employee incentive schemes.

We have formed companies for stock exchange listings and manage a number of international employment companies. In conjunction with the company's own advisers we can recommend on the most efficient and appropriate structures.

*In addition to the services already mentioned, our Guernsey office has specialist experience in the following areas:*

## Employee Benefit and Share Trusts

Frequently used by companies as a means of attracting, rewarding and retaining staff.

## Family Offices

We manage family offices for a number of international families where we look after all aspects of their financial affairs and provide a form of concierge service.

## Private Trust Companies

These are often, but not always, used as part of a family office structure and are popular with clients who may want a closer involvement with the management of the family trusts.

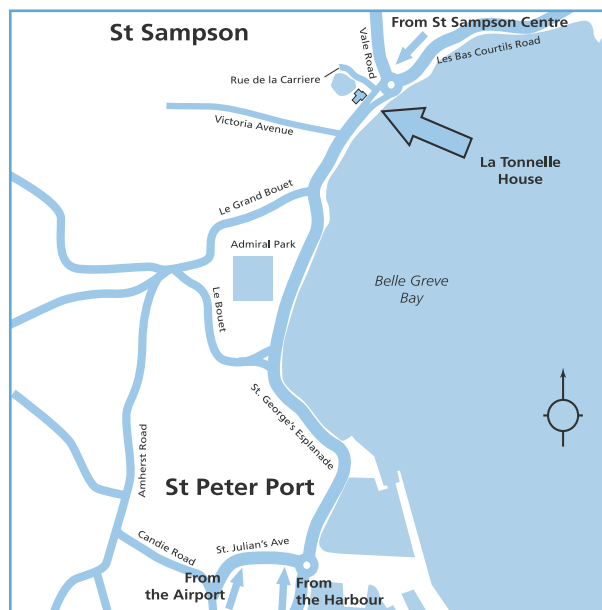
## High Profile Clients

We have extensive experience in managing the affairs of clients who are in the public eye for media, business or political reasons where the emphasis may be on asset protection and discretion. We are also well practised in advising clients from some of the world's newer and fastest growing economies.

## Fund Administration

Through our sister company Saffery Champness Fund Services Limited we provide third party fund administration services. A separate brochure is available regarding this service.

**This brochure offers a broad overview of the services we can provide. If you would like to learn more and discuss your specific needs, please contact us.**



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*Images kindly provided by Visit Guernsey*

The firm is regulated for a range of investment business activities by the Institute of Chartered Accountants in England and Wales. Saffery Champness is a member of Nexia International, a worldwide network of independent accounting and consulting firms.



## GUERNSEY, OUR PEOPLE



### Kelvin Hudson

**Responsibilities:** Kelvin provides advice to wealthy families on the establishment and administration of offshore structures to safeguard and enhance their wealth in a tax efficient manner.

**Specialist areas:**

Kelvin has developed a niche area of dealing with extremely high net worth individuals. In connection with this area he has dealt extensively with UK Counsel to develop international structures designed primarily to protect assets from third party attacks.

**History:** Kelvin moved to Guernsey in 1995 to be Managing Director of a local trust company. He joined Saffery Champness in February 1999 and was appointed as Managing Director in January 2001.

**Qualifications:** Kelvin qualified as a Chartered Accountant in 1985.

**Outside Interests:** With four children, Kelvin tends to focus on family life when the opportunity permits! He is a keen water (and snow) skier and enjoys cycling and swimming.

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### Roy Angliss

**Responsibilities:** Roy is responsible for the development of the Firm's audit and tax practice.

**Specialist areas:**

The audit of all entities that thrive in Guernsey, namely funds, captive insurance companies and property holding companies.

**History:** Roy had worked previously with Coopers & Lybrand and Touche Ross before he joined the Firm in 1994. He was appointed Audit Partner in 1997.

**Qualifications:** Roy qualified as a Chartered Accountant in 1985.

**Outside Interests:** Roy is married with three children and plays an active part in the local community, being closely involved with several local associations and institutions. He takes a keen interest in sport and is Honorary Financial Secretary of the Royal Guernsey Golf Club.

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## GUERNSEY, OUR PEOPLE



### Nick Batiste

**Responsibilities:** Nick is responsible for a team specialising in the establishment, administration and operation of offshore structures.

**Specialist areas:**

- Advising high net worth individuals on offshore structures
- The formulation of corporate structures

**History:** Nick joined the Guernsey office in 1992 and has worked at every level within the fiduciary team.

**Qualifications:** Nick is a Chartered Certified Accountant, having qualified in 2000, and was admitted as a Fellow in 2005.

**Outside Interests:** Nick is married with two young children, enjoys swimming and is an avid follower of football and motorsport.

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### Helen Green

**Responsibilities:** Helen is responsible for trust and company administration at Saffery Champness.

**Specialist areas**

- Advising private clients in establishing trust and company structures
- Third party fund administration, including acting as a Non-Executive Director of a number of listed funds and companies
- Employment companies
- Family office

**History:** Helen joined the Saffery Champness UK partnership in 1984 and became a Partner in 1997. She relocated to Guernsey in 2000.

**Qualifications:** Helen qualified as a Chartered Accountant in 1988.

**Outside Interests:** Helen enjoys skiing and scuba diving, on exotic holidays, rather than locally. In her spare time she is Treasurer of the Guernsey Branch of The Lady Taverners and a Director of The St John Ambulance and Rescue Service.

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## GUERNSEY, OUR PEOPLE



### Mark Le Ray

**Responsibilities:** Mark is responsible for personal and corporate taxation at Saffery Champness and advises the Board and clients on all tax matters, including capital gains tax, income tax, inheritance tax and offshore tax planning.

**Specialist areas:**

- The tax efficient use of offshore trust and company structures
  - Guernsey/UK double taxation treaty planning and interpretation
- History:** Before joining Saffery Champness in 1996 Mark worked for the Guernsey Tax Authority.

**Qualifications:** Mark qualified as a Chartered Certified Accountant in 1997 and as a Chartered Tax Adviser in 1999.

**Outside Interests:** Mark is currently trying to regain the fitness levels he, allegedly, had in his youth and his young daughter is helping in this respect, by making him do as much running around as possible.

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### Alasdair McLaren

**Responsibilities:** Alasdair is responsible for a portfolio of clients and is also involved in developing the firm's Guernsey business.

**Specialist areas:**

- Advising private clients in establishing trust and company structures
- Employee benefit and share ownership plans
- Third party fund administration

**History:** Alasdair joined the firm in 2006 and has worked in the trust industry in Guernsey and the British Virgin Islands for 20 years.

**Qualifications:** Alasdair is a Chartered Accountant, a member of the Society of Trust and Estate Practitioners (STEP) and a Fellow of the Securities Institute. He has an MA from the University of Aberdeen where he studied economics and accountancy.

**Outside Interests:** Alasdair is a local committee member for STEP and the Guernsey Association of Trustees. With three young children, spare time is limited but he does confess to being a fanatical skier and a hopeless surfer.

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## GUERNSEY, OUR PEOPLE



### Lorna O'Donnell

**Responsibilities:** Lorna is responsible for developing policies and controls to ensure the Firm meets its regulatory and legal obligations. As the Firm's MLRO she liaises with the GFSC and FIS and provides advice and training to staff on all compliance and AML issues.

**Specialist areas:**

Risk assessment and compliance monitoring and review.

**History:** Lorna has been with the Guernsey office since 1980 and has many years experience in offshore trust and company administration. She has had direct responsibility for compliance and regulatory work since 1992.

**Qualifications:** Lorna is a Chartered Secretary, a Trust and Estate practitioner and a member of the Institute of Management.

**Outside Interests:** A member of the Guernsey Scottish Association and enthusiastic Scottish country dancer.

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### Ian Powell

**Responsibilities:** Ian is responsible for fund services at Saffery Champness.

**Specialist areas:**

Ian specialises in anything of a corporate nature, but collective investment schemes in particular.

**History:** Ian has worked in the mutual fund industry since 1980. He joined Saffery Champness in March 2007, having worked at Kleinwort Benson for 27 years, where he was Head of Channel Island Corporate Clients.

**Qualifications:** Ian qualified as a Chartered Secretary in 1992 and is also a Fellow of the Chartered Institute for Securities & Investment.

**Outside Interests:** Ian is a keen kayak surfer and enjoys most sports. He has represented the island at both table tennis and football.

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## GUERNSEY, OUR PEOPLE



### Lisa Vizia

**Responsibilities:** Lisa's dedicated family office team manages offshore structures for ultra high net worth families, with a particular focus on the Middle East.

**Specialist areas:**

- Family and private office trust arrangements
- Complex trust structures for ultra high net worth individuals and family trusts for UK resident non domiciled individuals
- Executive remuneration schemes for listed and private companies

**History:** Born in Guernsey, Lisa began her fiduciary career in 1986 and has worked in the trust industry throughout this time. She joined the Saffery Champness board having previously worked for a leading international company.

**Qualifications:** Lisa is a member of the Society of Trust and Estate Practitioners (STEP) and the Institute of Directors (IoD).

**Outside Interests:** Lisa's interests include horse riding, travel, reading and supporting her daughter's passion for classical ballet.

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### Contact Guernsey office:

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