

Equiom

Welcome to Equiom

Your Trust. Our Excellence.

The Equiom Way

equiomgroup.com





Welcome to Equiom

For over four decades, Equiom has supported international corporations, high net worth individuals, and families worldwide with their fiduciary and related business support needs.



With offices in the leading international finance centres, we operate as a truly global entity, offering a comprehensive suite of professional and business support services. We deliver those services 'The Equiom Way' – with passion, reliability and responsiveness.

We take pride in using our global expertise, knowledge, and insight to create innovative and tailored solutions that drive our corporate and private clients towards their objectives.

Upholding our vision to excel in trust and corporate services across key markets, we are renowned for our top-quality service, expertise, integrity, efficiency, and industry-leading business performance.

Thank you for considering Equiom as your trusted partner on your journey to success.

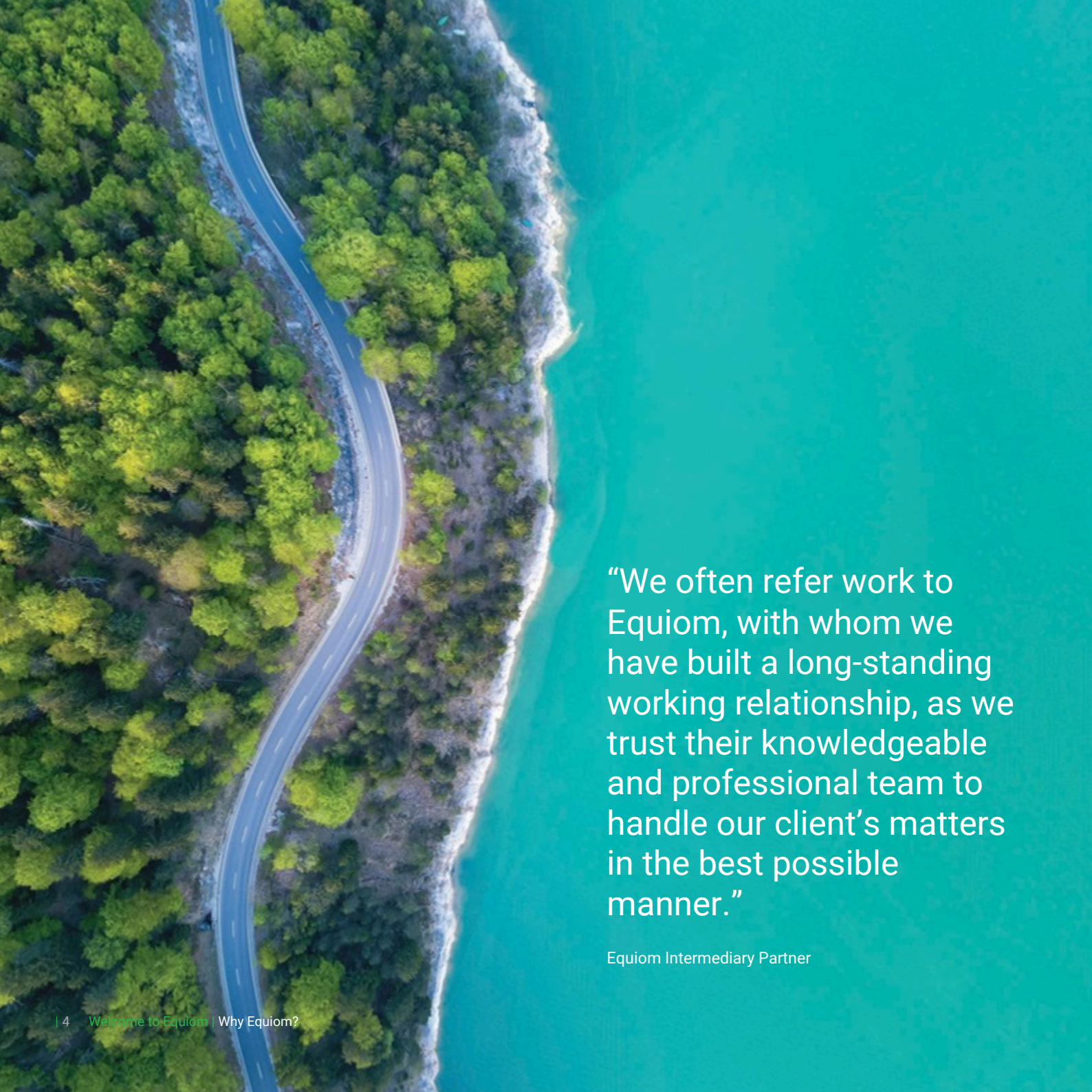
Kind regards

Jon Jennings

Chief Executive Officer

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“We often refer work to Equiom, with whom we have built a long-standing working relationship, as we trust their knowledgeable and professional team to handle our client’s matters in the best possible manner.”

Equiom Intermediary Partner

Why Equiom?

We aim to go beyond exceptional service to develop deep and long term client relationships, providing an unrivalled breadth of end-to-end solutions for private wealth structuring, family office management, institutional support, corporate structuring administration and accounting services. Our team of experts serve a diverse client base including private individuals, institutional entities, and corporate enterprises, ensuring their unique needs are met with precision and excellence.

Core Services:

- Private Wealth & Family Office Services
- Luxury Asset Services
- Corporate Services
- Employee Retirement & Reward Services
- Governance Support & Solutions



Wide Breadth of Services

To meet the needs of private, institutional and corporate clients



11 Locations

Across the globe



400+ People

Throughout Europe, the Middle East and Asia



45+ Years

Of innovation & tailored solutions

Our values drive and define our business

Integrity

- A commitment to honesty, transparency, and ethical behaviour in all actions and decisions

Respect

- Working together to create a positive and harmonious partnership that fosters trust and enhances communication

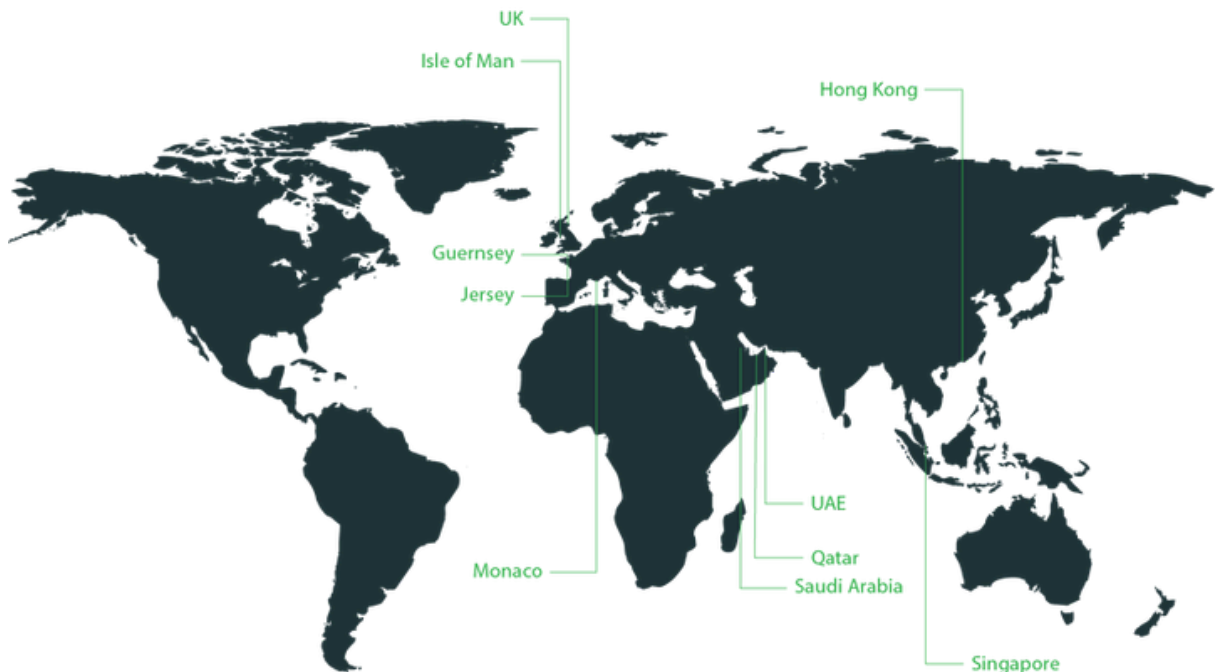
Excellence

- Prioritising our client needs, exceeding expectations, and embracing commerciality by consistently delivering the highest standard of service, always

Our Locations

Whether you are a pioneering individual or a global corporation, we will work with you to navigate the twists and turns on your journey towards achieving your ambitions.

Equiom doesn't just have a global reach, but a global presence. With offices throughout the UK and Crown Dependencies, Europe, Asia and the Middle East, you're never far from our expertise.



Europe

Equiom's presence across the Crown Dependencies and UK is a key part of our global network. From our headquarters in Jersey to our excellent client service teams in the Isle of Man, Guernsey and Scotland, we deliver tailored fiduciary, corporate and governance solutions to international private clients, family offices, corporates, and institutional investors. Our multidisciplinary teams provide a comprehensive suite of services across five core areas: Private Wealth & Family Office, Corporate Services, Employee Retirement & Reward, Luxury Asset Services, and Governance Support & Solutions.

Complementing this regional footprint, Equiom's long-established Monaco office supports ultra-high-net-worth individuals, international families and entrepreneurs, delivering tailored cross-border and domestic solutions with a focus on corporate and trust structuring.

Middle East

With a strong local presence across the Middle East, including strategic offices in the United Arab Emirates including the Dubai International Financial Centre (DIFC) and the Abu Dhabi Global Market (ADGM), Qatar Financial Centre (QFC), and a growing presence in Saudi Arabia. Equiom's experienced multi-lingual teams can support clients within the region and beyond.

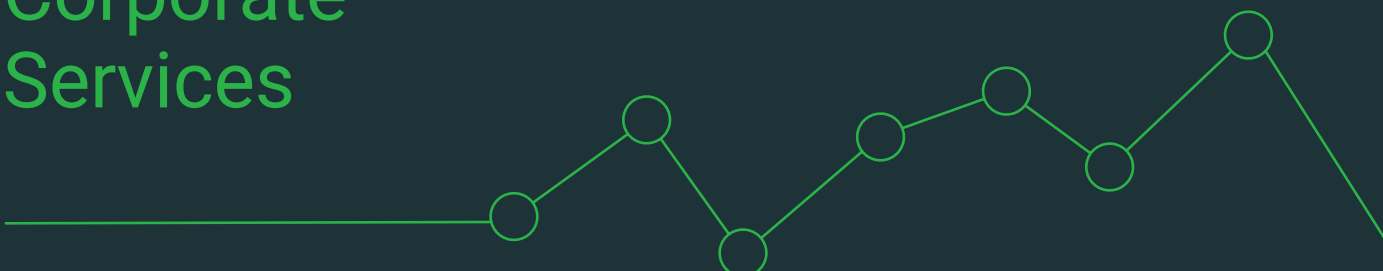
A comprehensive suite of corporate, governance and employee incentive solutions is provided to both established businesses and those expanding into the region. Equiom also supports high-net-worth individuals and families in managing complex, multi-jurisdictional wealth.

Asia

Equiom has been present in Asia for over a decade, operating from key financial and commercial hubs to deliver cross-border expertise and seamless service throughout the region and beyond. From our offices in Singapore and Hong Kong, our team delivers bespoke trust, fiduciary and corporate solutions.

Our seasoned professionals combine international expertise with regional insight to support individuals and businesses as they establish and grow their presence in the region.

Corporate Services



We pride ourselves on our director-led ethos which spans our footprint to enable global solutions. Leveraging our extensive network of experts, we combine international expertise with local knowledge to provide bespoke services including, fiduciary support, provision of key personnel such as company directors, non-executive directors, and nominee shareholders, outsourced business services, and corporate secretarial and administration services.

We are the trusted choice for institutional and corporate clients delivering solutions tailored to meet the needs of both local and global clients.

“The Equiom team really understand our business needs, are knowledgeable, responsive, and reliable. Our partnership from the time of onboarding and throughout the key transaction process has been impressively smooth, efficient, and effective.”

Equiom Client

Corporate Administration

We offer comprehensive corporate administration services to streamline business operations, including company formation, and SPV (Special Purpose Vehicles) administration. Our services include managing board meetings, handling regulatory submissions, and providing key personnel, including authorised individuals, allowing businesses to focus on growth while maintaining compliance and efficiency.

Corporate Secretarial

We provide robust corporate secretarial services designed to maintain entities in good standing across multiple jurisdictions. Our offerings include compliance management, document drafting, board support, and entity dissolution, ensuring that all legal and regulatory requirements are met, and your company remains compliant and well-organised.

Directorship Services

Equiom's directorship services equip your business with the expertise and independent oversight necessary to thrive in today's complex regulatory landscape. We can provide seasoned professionals to serve as independent directors for your onshore or offshore company.

Our corporate directors bring in-depth knowledge of company formation, structuring, administration, and regulatory compliance, ensuring your business is expertly managed and governed.

Entity Formation & Management

Our comprehensive range of services is designed to assist you in managing the challenges of business operation and growth. We facilitate global expansion and streamline administrative tasks through our business-enabling services. Whether you are establishing a new entity or structure, entering a new jurisdiction or require support with existing operations our expertise ensures your needs are met with precision and professionalism.

Islamic Finance

We offer a wide range of administration and accounting services to support Sharia-Compliant Investment Structuring, working with relevant advisers (including Scholars) to deliver investment solutions and wealth management services aligned with your ethical values.

Financial Accounting & Reporting Services

Equiom's Financial Accounting & Reporting Services empower businesses to focus on growth while we manage the complexities of accounting and taxation. Our local specialists offer customised solutions that meet regulatory requirements across markets, helping you stay compliant and make informed decisions.

Corporate Direct & Indirect Tax Services

We guide, support and build effective structures that work in harmony with efficient tax strategies. Working closely with our client's key stakeholders, we support our clients' tax advisory requirements drawing on our substantial technical experience and knowledge in a variety of areas. These include financial services and investment funds, property real estate, fintech start-ups, e-Gaming, luxury assets acquisition and multi-sector corporate structuring for trading.

Governance Support & Solutions



We understand that good governance is crucial for the long-term success of any organisation. Our professional team assists companies in establishing clear governance structures, enhancing decision-making processes, and improving overall accountability.

By partnering with Equiom, you gain access to a wealth of expertise and resources that ensure your company meets legal requirements and adheres to best practices. We help you create a governance environment that not only complies with regulatory requirements but also builds trust and confidence among stakeholders.

“We trust their knowledgeable and professional team to handle our client’s matters in the best possible manner.”

Equiom Intermediary Partner

Independent Director & Company Secretary Services

Our professional team acts as an extension of your organisation, helping you to navigate the regulatory landscape and providing compliance and risk support in accordance with the necessary legal framework. We support our clients in meeting any governance, risk and compliance challenges through our comprehensive suite of services and by offering you management solutions to ensure your company is structured correctly and is fit for growth.

Outsourced Compliance & Risk Management Services

We provide outsourced money laundering reporting officers, compliance and risk management services, designed to ensure your organisation remains compliant with local and international regulations. We work with you to ensure robust systems and controls are in place and provide additional compliance or risk management support where needed. Our team of experts specialises in multiple sectors, from asset management, money payment services to private and investment banking, offering tailored solutions to meet your specific needs.

Accounting & Tax Compliance

Our team provide comprehensive accounting and tax compliance services to ensure your business operations are accurate, compliant, and efficient. We empower our clients to make informed decisions and meet regulatory requirements while optimising financial performance. Our services include financial accounting, tax planning and advisory, tax compliance, management reporting, audit support, VAT services and payroll services including calculations, statutory deductions, and payments.

Data Protection Advisory

We help businesses navigate complex data protection regulations in the UAE, DIFC, and ADGM. Our experts provide tailored solutions, including the design of data privacy frameworks, staff training, and outsourced Data Protection Officer services, ensuring your organisation remains compliant, secure, and well-prepared for regulatory challenges.

Employee Retirement & Reward Services

International employee benefit plans are essential for employers aiming to attract and retain top talent, ensuring a committed and motivated workforce. We offer a wide range of trustee services tailored to meet the needs of both employers and employees.

“The team at Equiom add a lot of value to the development of the client experience and we look forward to continuing our work with them on existing clients and future opportunities.”

Equiom Intermediary Partner



International Pension Plans

Equiom provides a comprehensive range of trustee services for international pension plans, designed to meet the diverse needs of multinational corporations and their employees. With extensive experience in managing international pension plans and in-depth knowledge of local and international regulations, we ensure your plan(s) meet all relevant requirements, reducing the risk of cross border non-compliance.

Employee Benefit Trusts & Share Ownership Plans

At Equiom, we know how important it is to reward, motivate, and incentivise your workforce effectively. Employee Benefit Trusts (EBT) and Employee Share Ownership Plans (ESOP) are powerful tools to achieve this, and our comprehensive trustee services ensure these schemes are managed seamlessly, providing financial security, and building loyalty among employees. Our experience and commitment to excellence ensure effective management of your plans, enhancing employee engagement and retention, and aligning with your business goals.

Carried & Co-Investment Structures

Equiom offers customised solutions tailored to your investment requirements and regulatory environment. Whether you require

a co-investment and/or a carried interest structure for a private close-ended arrangement or a specific project, our services are designed to align interests and support your investment strategy.

Our extensive experience, collaborative approach and commitment to excellence ensure structures are effectively administered, accounted for and governed in line with your investment goals.

Middle East Workplace Savings & End of Service Benefit Plans

Equiom specialises in structuring and managing End of Service Benefit (EOSB) and Workplace Savings Plans in the Middle East, ensuring compliance with regional regulations.

With over 20 years of experience, Equiom is a market-leading trustee in the Middle East and Equiom Fiduciary Services (Middle East) Limited holds the prestigious role of Master Trustee to the DIFC Workplace Savings (DEWS) Plan.

Our team provides professional expertise in plan structure, funding strategies, and administration. Our services ensure that employees receive the financial benefits they are entitled to, enhancing loyalty, retention and satisfaction while ensuring legal compliance.

Equiom Fiduciary Services (Middle East) Limited is regulated by the DFSA.

Private Wealth & Family Office Services



We specialise in helping affluent individuals and families enjoy their lives to the fullest. Our professional expertise spans multi-jurisdictional wealth and asset protection, succession planning, and wealth transfer solutions. We ensure comprehensive support for our sophisticated clientele, enabling them to live their best lives with the assurance that their wealth is expertly managed, overseen and protected.

“Their adept handling of complex trust matters, coupled with transparent and timely communication, supports, and supplements our market leading proposition, to provide a best-in-class customer experience.”

Equiom Intermediary Partner

We are committed to supporting your private wealth and family office needs with professionalism and tailored solutions, ensuring that your success is sustained and enhanced for the future.

Wealth Structuring & Succession Planning

We offer comprehensive private wealth structuring and business support services tailored to high-net-worth individuals and families. Our specialised teams ensure clients maintain control over their wealth while supporting their ambitions and ongoing success. Whether you require asset protection, succession planning, or efficient wealth provision for your family, our expertise covers your needs.

Family Office Services

Our family office services are designed to simplify and enhance the management of your family's wealth. At Equiom, we provide comprehensive, tailored support. We offer solutions in wealth management, tax planning, estate planning, and more, all aimed at protecting, growing, and seamlessly transferring your wealth across generations.

Trustee & Fiduciary Services

We provide independent trustee services and fiduciary services. We handle the establishment of trusts or foundations and administer them meticulously to maximise benefits. Services include maintaining legal and tax status, providing regular accounting and financial reporting, and much more.

Private Foundation Services

Equiom specialises in the creation and administration of private foundations, offering a flexible structure for succession planning, asset protection, and philanthropy. We ensure that foundations comply with regulatory requirements while fulfilling the specific needs of founders, providing peace of mind and securing family legacies.

Direct & Indirect Tax Compliance and Advisory Services

Our direct tax services offer comprehensive support for individual and corporate tax advice, estate planning, and annual compliance. We work with your advisors to minimise tax liabilities and enhance financial performance.

For indirect tax, our VAT and Customs Duty services ensure compliance with regulations. We provide strategic advice, transactional support, dispute resolution, and act as your VAT agent, handling complex customs procedures. Our training services equip your teams to manage VAT effectively.

Financial Accounting & Reporting Services

Equiom's expert accounting teams provide a comprehensive range of Financial Accounting & Reporting Services designed to help you make informed decisions and maintain full tax compliance. Our local specialists offer customised solutions to meet regulatory requirements across various markets.

Luxury Asset Services



Our experienced team guides private and corporate clients in acquiring and managing luxury assets such as private jets, superyachts and high-end properties.

We support all aspects of luxury asset ownership, including yacht brokerage and management, tax-efficient ownership structures, succession planning, multi-jurisdictional aircraft registration and administration, and management oversight of real estate portfolios.

Our services offer the highest level of care and expertise tailored to our clients' unique needs, ensuring smooth transactions, effective ownership structures and relief from administrative challenges.

"We can always rely on Equiom to protect our interest. In fact, Equiom has been nothing but a loyal friend to the family. Indeed, in Equiom we trust, in Equiom we prosper."

Equiom Client

Corporate Structuring for Luxury Assets

Equiom's team of specialists offers expert guidance on the most effective structures for your luxury assets. We consider all aspects, including taxation, legal implications, and regulatory requirements, to provide solutions that are tailored to your specific needs. Our goal is to ensure your luxury assets are structured and managed to enhance their value and protect your interests. We provide comprehensive management services for yachts, private jets, high-value properties and other luxury assets. Our services include regular maintenance, oversight, financial reporting, and compliance management, allowing you to enjoy your assets without administrative burdens.

Private Client & Family Luxury Assets Management

Luxury assets often form an integral part of our clients' lifestyle and identity. From aircraft and yachts to high-value residential properties, classic cars, wine and art collections, these assets represent not just investments but passions. With over 45 years of experience in private client services, we have deep technical understanding of these complex assets, allowing us to assist clients with all aspects of ownership and operation.

Real Estate (Commercial & Residential)

Equiom's real estate services are designed to optimise the structure and performance of your investments. We provide comprehensive management oversight, ensuring your properties are maintained and managed to the highest standards. Our investment holding vehicles and collective investment solutions offer efficient ways to manage and grow your real estate portfolio.

Our debt restructuring services help optimise the financial performance of your real estate assets, while our tax advisory and compliance services ensure you meet all regulatory requirements. Whether you are acquiring high-value residential properties, looking to structure real estate within listed investment vehicle, or managing a portfolio of commercial real estate, our team of experts are here to support you every step of the way.

Crewing Services

Our comprehensive crewing services are tailored to the unique needs of both vessel owners and operators, covering every aspect of crew management, from employment agreements and payroll to external legal advice. By handling these essential details, we allow you to concentrate on the strategic aspects of vessel operation.

Please note this content has been carefully prepared, but it has been written in general terms to provide an overview of the services available across the Equiom group and should be seen as broad guidance only. The statement is not intended to suggest that each service listed is provided by all office locations. For more specific information, please contact our team or an office location of your choosing by emailing enquiries@equiomgroup.com.

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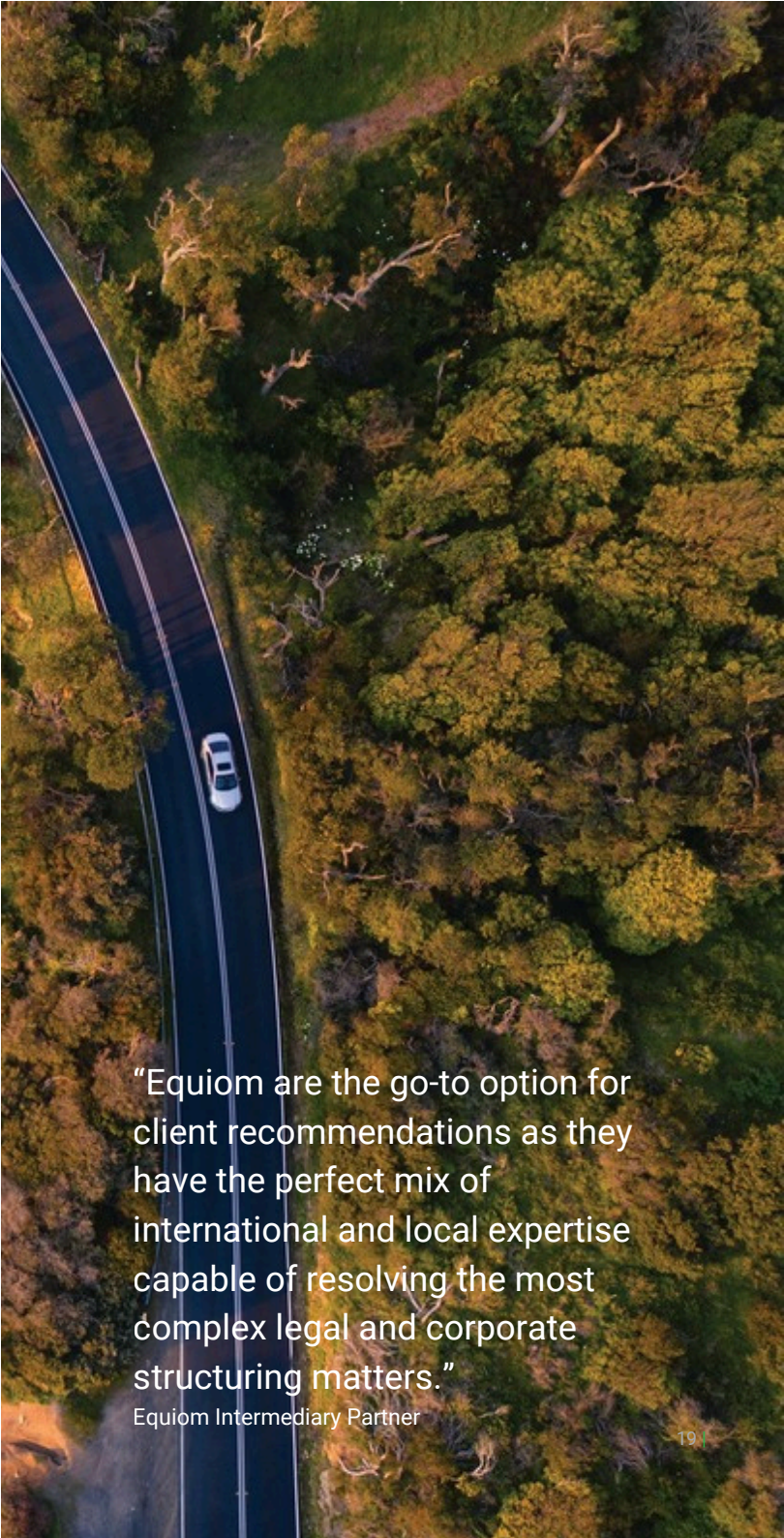
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*For information on the regulatory status of our companies,
please visit www.equiomgroup.com/regulatory*



"Equiom are the go-to option for client recommendations as they have the perfect mix of international and local expertise capable of resolving the most complex legal and corporate structuring matters."

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