

PRIVATE CLIENT SERVICES

Philanthropy

Putting your wealth to good use



The use of wealth structures such as Trusts, Foundations and Family Offices has long been the primary method for preserving and protecting wealth for future generations.

A growing global trend is for wealthy individuals and families to look at their wealth as a means to make the world a better place. This can be done through philanthropy, or impact investing – the investing of their wealth in good causes that work to improve the lives of people all over the world.

How to make a difference

- Impact investing: in projects, businesses or charities that do good – placing charitable goals above return. Supporting business in developing countries, creating jobs, facilities and development. If successful a return is made and can be reinvested
- Venture philanthropy: Creating a start-up situation; investing to encourage growth and risk-taking within social enterprises
- Collaboration and sharing: Expertise is a valuable commodity ; philanthropists can facilitate knowledge sharing, and support and connect good causes with expert advice
- Charity incubators: If a philanthropist has discovered a need within a society, they may look to support an individual or group to address this need and set up a charity from scratch. This is a riskier proposition than engaging in an existing and established organisation, but if successful the charity can expand in reach and stand on its own

Which structure?

A foundation structure provides the right set up for philanthropic investments. It is flexible, quick to establish and offers more control for philanthropists over the administration of their assets. A foundation also offers the ability to hold philanthropic investments alongside other more traditional ROI based investment vehicles, sharing a treasury function. Funds raised by that profit focused endeavour, along with any profit from social impact investing can therefore be easily reinvested by the Foundation.

Foundations offer a good balance of transparency and confidentiality, plus the council structure of a foundation enables the wealthy individual or family to join decision making with the corporate service provider and other experts from the financial services sector.

We can deal with the establishment of a foundation along with the take-on of existing foundations and provide Council Members, Guardians, act as Registered Agents and provide full administration and accounting services.

For more information please contact:

Nick Ford

Director
nick.ford@msgsy.com
+44 (0) 1481 742010



A Fellow Chartered Certified Accountant (FCCA), Nick has over 20 years' experience in trust and corporate services. Recognised in ePrivateClient's Top 35 under 35 and Citywealth Future Leader lists, Nick has extensive experience in dealing with high net worth families and complex structures across a wide range of jurisdictions.

Sean Baudin

Director
sean.baudin@moorestephens-jersey.com
+44 (0) 1534 600333



Sean has more than 30 years' experience within private wealth management, most recently as Deputy CEO and Head of Private Client Trust of an international banking group. He has extensive experience of running high performing trust businesses across Jersey, Guernsey and London creating strong relationships with clients and delivering a truly personal service to meet their complex needs.



MOORE Stephens

Moore Stephens Fiduciaries
(Guernsey) Limited
PO Box 146, Town Mills South
La Rue du Pré, St Peter Port
Guernsey, Channel Islands, GY1 3HZ



MOORE Stephens

MSTC (Jersey) Limited
PO Box 236, First Island House
Peter Street, St Helier, Jersey
Channel Islands, JE4 8SG

www.moorestephensci.com