



bks
family office

Formation and Development

BKS Family Office Limited was incorporated in October 2008, founded upon the principle that bigger does not necessarily mean better.

This may apply in many cases but as an independent Jersey Trustee delivering specialist company and trust services whilst cultivating long term personal relationships based upon trust and understanding, we repeatedly demonstrate how smaller can prove to be more effective.

Our aim is to be regarded as the “family trustee” in the traditional sense that it once had before trustee services became a tax or wealth capturing “product”.

Clients

BKS currently have approximately 55 clients under management, with a global reach spanning across 4 continents. We have over 200 entities, comprising more than 130 companies and 65 trusts.

Quality and Care

Our collective skills place us in an ideal position to provide professional services to families during what may be a sensitive period.

Our focus on private clients means that we have a highly developed ability to attune our service to a family’s needs and to revise our service as those needs change.

Vast fields of cooperative experience in asset management have enabled us to focus extensively on what the right decisions are for individual clients and families. Maintaining a trusted and personal eye on financial affairs improves the quality of care and service that BKS provides.

Products and Services

The services we provide are varied ranging from the provision of independent trustee and accounting advice and offshore directors to basic book keeping.

We are happy to discuss the use of foundations, private trust companies, trusts, managed trust companies, assisting in family governance and succession planning which all feature among our services.

We feel it is important for both parties that the parameters of our engagement are agreed in advance, as our pricing preference is to work to pre-agreed fees.

We prefer to work directly with client families.

We are at our best when we are at the centre of the family’s financial matters and have a complete picture of the family’s wealth, strategy, concerns and ambitions.

Succession

Among the numerous advantages of family-centric trust companies like BKS, a personal touch at sensitive times often proves to be crucial particularly during the handling of Wills.

In bypassing the probate process through which a Will is handled by the judicial system, a trust may reduce costs or delays, and provide more privacy than a bequest in a Will, as well as offer possible tax advantages.

Our ability to deal with probate, diverse property classes, debtors, creditors, donations and taxes means that we can often expedite what can be a daunting administrative process.



Our Key Philosophies

At BKS we wholeheartedly believe in the highest importance of the following principles:

- ◆ Developing direct and long lasting client relationships;
- ◆ Providing excellent proactive service;
- ◆ Constructing an effective team that is best suited to the needs of our clients;
- ◆ Managing our business and ourselves professionally and with the utmost integrity;
- ◆ Coupling comforting informality with absolute professionalism in service;
- ◆ Dealing with all of our clients with equal respect.



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