

FAMILY OFFICE SERVICES

Strategic wealth objective setting

- Designing solutions to achieve long-term goals.
- Active monitoring and review of your long-term goals and short-term priorities.
- Regular client meetings with formal quarterly client reporting and review cycle.

Quarterly client review meeting, wealth & investment reporting

- With ongoing access to the Argeau directors and investment team as required.

Project management

- Estate and inheritance planning.
- Taxation and domicile matters.
- Philanthropic strategy and structuring.
- Debt origination and re-financing.
- Insurance and protection.
- Disputes and over-charging.
- Deal and transaction management.

Coordination with tax, legal and incumbent professional advisors

- Co-ordinate and collaborate with incumbent tax, legal and professional advisors in relation to “business as usual” and ad-hoc projects.

Communication with key stakeholders

- Engaging as required with family members, business partners, professional service providers, financial institutions, and other stakeholders in relation to our clients’ financial affairs.

Ad-hoc services

- Bank and Investment account opening.
- Professional service provider (re)selection.
- Estate administration.

© Argeau 2022 — This document remains the property of Argeau Holdings Limited (“Argeau” or “the Company”). Registered in Ireland, no: 663806. Directors: A Cleland, S Felle, B McGrath. Registered office: 20 Hatch Street Lower, Dublin, D02 XH02, Ireland. It is being shared on a confidential basis with its specific recipient. It does not constitute an offer or solicitation by Argeau or its directors for the recipient, or any party connected with the recipient, to become a client of the Company. It should not be forwarded, shared or duplicated without the express permission of Argeau.

Disclaimer and Disclosure Statement

The information and commentary presented in this report by Argeau Holdings Limited (Argeau) is offered as general guidance for the interest of the recipient only. The information herein is based on Argeau’s understanding of current legislation and financial markets, and is subject to change without notice.

This material herein is: (i) for your private information, and Argeau is not soliciting any action based upon it; (ii) not to be construed as an offer or a solicitation of an offer to buy or sell any security in any jurisdiction where such an offer or solicitation would be illegal; (iii) not professional advice in relation to financial, investment, tax, legal, or accounting matters (iv) not to be construed as a recommendation, representation or strategy suitable for your own personal circumstances (v) does not take into account the investment objectives, knowledge and experience or financial situation of any particular person or company and (vi) based upon information that Argeau considers to be reliable.

This report is not to be used or considered as a recommendation to buy, hold or sell any securities or other financial instruments; and does not constitute an investment recommendation or investment advice under MiFID legislation.

Argeau does not warrant or represent that the publication is accurate, complete, reliable, fit for any particular purpose or merchantable; and does not accept liability for any act (or decision not to act) resulting from the use of this publication and related data. Argeau shall have no liability for the use, misuse, or distribution of the information contained herein.

Argeau Holdings Limited (“Argeau”) is not authorised or regulated for the provision of investment advice. Accordingly Argeau shall not provide any services that could be considered or construed to be a regulated activity. To the extent that any regulated services are provided by a member of the Argeau group of companies these services may be provided by Argeau Advisory Limited (“Argeau Advisory”). Argeau Advisory Limited (Registered in Ireland, no. 664467) is regulated by the Central Bank of Ireland. Argeau (UK) Limited (Registered in England, no. 13241178) has its registered office at 71-75 Shelton Street, London WC2H 9JQ.

Specific professional financial, investment, tax, legal or accounting advice should be sought from your financial advisor, investment advisor, stockbroker, banker, solicitor, tax advisor, accountant or other independent professional adviser.