



Family Office



OVER
£2 BILLION
ASSETS UNDER ADMINISTRATION

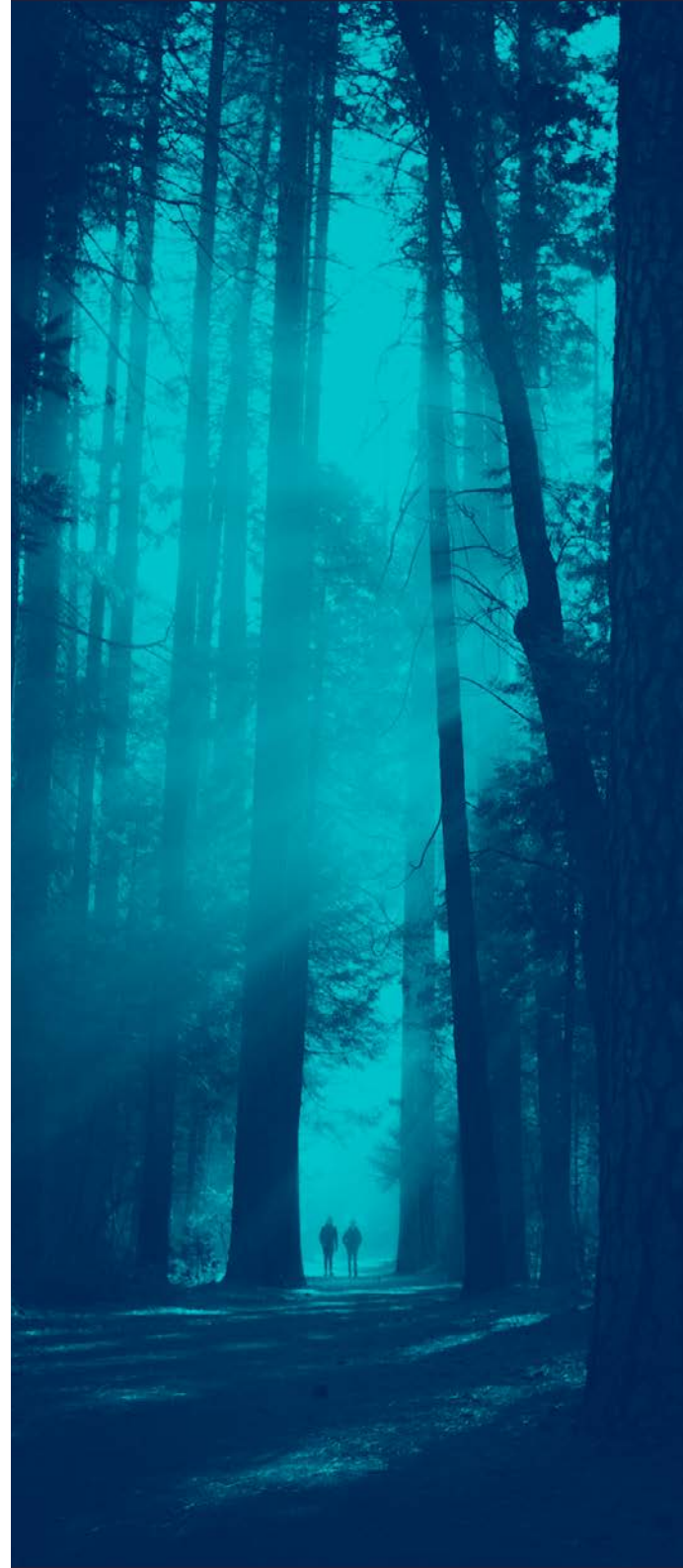
FAMILY OFFICE

Our experience assisting several families has equipped us to meet complex requirements and exceed expectations. Our services span across a diverse range of sectors, whilst covering multiple jurisdictions which gives our clients vast opportunities and the flexibility to tailor their investment strategy and investment vehicles. Our expert advice has earned us a strong reputation in the luxury asset sector and provides our clients with a clear guidance on how to achieve their long-term goals.

We invest time to understand the family values and family legacy. Our personal approach provides close support in both personal and financial goals. Our extensive knowledge in fiduciary services and well established international network provides our clients with diversity, security and protection.

OUR SERVICES

- Expert advice and guidance
- Wealth creation and protection
- Risk assessment and analysis techniques
- Education and mentoring
- Personal lifestyle management
- Financial portfolio management
- Investment strategy planning
- Administration
- Tax and Legal services
- Ownership structures
- VAT registration



OUR FAMILY OFFICE TEAM



Alex Gardner
Group COO



Andy Morgan
Group CEO



Colin Quayle
Company Secretary

OUR STORY

Our journey began in 2004 in the Isle of Man, managing luxury assets for clients that require the highest level of service.

Our success initiated in the yachting sector and we registered some of the first super yachts in the Isle of Man. Our personal approach and professional expertise earned us a reputable position in the luxury asset sector.

In 2011 we set up our office in Malta, a leading global maritime hub placed in strategic geographical location. Our expansion was a transformational success and significantly grew our client base. Our continuous growth has allowed us to diversify and expand our service offering into a diverse range of sectors including, Aviation, Trusts, E-Gaming, E-Sports, Fintech, Companies, Commercial Property, Relocation, Resident-Citizenship and Foundations.

Our approach to business has remained consistent throughout our organic growth. We aim to deliver a level of service that is unrivalled, applying the philosophy that made us successful in administering luxury assets, to each of our sectors.

Our team hold extensive knowledge in fiduciary services spanning across multiple jurisdictions, giving our clients flexibility and security. Our wealth of experience has acquired us an established list of international intermediaries.

In 2019 Affinity was acquired by a longstanding client and under new leadership we experienced a period of significant growth. We rebranded, realigned our strategy and strengthened our team, putting our employees at the forefront of everything we do.

As we entered 2020 we surpassed over £2 billion of assets under our administration and opened our new office in the Cayman Islands.



AFFINITY IN MALTA

Malta offers...

- Robust regulation and jurisdiction with the Malta Financial Services Authority.
- A stable legal and political framework, a full EU member state and a Eurozone location.
- A leading reputation in the luxury asset sector.
- A diverse range of investment opportunities.
- A highly efficient fiscal regime which avoids double taxation of taxed company profits distributed as dividends.

AFFINITY IN THE ISLE OF MAN

The Isle of Man offers...

- Leading offshore financial hub and reputation position in the luxury asset sector.
- A stable legal and political environment.
- A diverse range of investment opportunities.
- Robust regulation and jurisdictions with the Isle of Man Financial Services Authority (“FSA”).
- Advantageous fiscal regime with 0% corporation tax, capital gains tax and a low personal income tax rate.





AFFINITY IN THE CAYMAN ISLANDS

The Cayman Islands offer...

- Robust regulation and jurisdictions through the Cayman Islands Monetary Authority.
- Strategic location with a diverse range of investment opportunities for clients inside and outside of the European Union.
- A strong maritime hub.
- A diverse range of wealth planning structures.
- Attractive fiscal regime with 0% corporation tax, capital gains tax or income tax.

WHY AFFINITY?

Apart from our leading reputation in the luxury asset sector and expert wealth management services, we believe our personal approach and friendly team attitude sets us apart. We invest in our client relationships which are based on trust and discretion to fully understand their individual aims and long-term goals. Our experience assisting families over the years and our tailored, bespoke service is how we identify and meet personal and financial goals.

We hold a local and international network of close relationships with well-established intermediaries that support our services.

TALK TO US

We are ready to support you with your family office requirements. Please get in touch if you would like advice or to speak to one of our experts.

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**A PERSONAL APPROACH TO CORPORATE,
DIGITAL & PRIVATE WEALTH SERVICES**



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Licensed by the Isle of Man
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