



Trust Services



**UNDERSTANDING YOUR REQUIREMENTS.
EXCEEDING YOUR EXPECTATIONS.**

OUR TRUST SERVICES

Our Isle of Man office provides trust services for holding assets such as property, investments, bank deposits, and life insurance policies, offering our clients long-term security and protection.

We have extensive expertise and years of experience in trust formation and management. Our personal approach to business allows us to develop tailored solutions for a broad range of client needs.

OUR SERVICES

- Provision of professional, independent or corporate trustees.
- Formation, registration, transfer or termination of trusts on your behalf.
- Assurance of adherence to the investment objectives.
- Provision of bespoke solutions to regulatory constraints.
- Maintenance of the trust's records.
- Management of secretarial and governance aspects relating to your trust.
- Registration of the trust with the relevant local authorities.
- Arrangement and facilitation of trustee meetings.
- Preparation and execution of trustee resolutions.
- Signing and execution of any required statutory documentation.





AFFINITY IN ISLE OF MAN

The Isle of Man offers...

- A diverse economy with sectors including yachting, aviation, digital currency, financial services, gaming and private wealth.
- A leading international offshore financial hub within a safe and attractive environment.
- A stable legal, political and social landscape.
- Robust regulation and jurisdictions with the Isle of Man Financial Services Authority (“FSA”).
- An advantageous fiscal regime with 0% corporation tax, capital gains tax and a low personal income tax rate.
- Excellent infrastructure.
- Company incorporation.

OUR STORY

Our journey started in 2004 when we formed in the Isle of Man. Yachting was our sole focus, and we grew with the success of the Isle of Man's new superyacht register.

We quickly developed relationships with clients who demanded attention to detail and excellent service. Through meeting their expectations, we won and retained business. As a result, many from 2004 are still with us today. We evolved as our client requirements changed and opportunities presented themselves, extending our services and opening a new office in Malta. Our diversification allowed us to further our relationships with many key clients, as we have worked together across several sectors, including aviation, corporate services, commercial and residential property, eGaming, fintech, and trusts.

Affinity underwent a transformative acquisition in 2019, ushering in a new, dynamic leadership team and innovative, niche and emerging sector services. Expansion to the Cayman Islands and South Florida followed, helping Affinity establish its position as a growing, contemporary brand with diverse offerings, standing out in the luxury asset and emerging sector arenas.

OUR TRUST TEAM



Roxy Sheeley
Managing Director (Isle of Man)



Richard Cockburn
Business Development Manager

WHY AFFINITY?

Our team has the necessary skills to manage your trust.

With offices in the Isle of Man, Malta, and the Cayman Islands, we can facilitate engagement with Island-based financial, legal and technical partners. We can establish entities through several jurisdictions. We take care of the management and administration of structures and provide a comprehensive range of services.

We pride ourselves on our knowledge, high standards of confidentiality, and risk management skills, which offer our clients and intermediaries peace of mind.

TALK TO US

We are ready to support you with your requirements. Please get in touch with us for advice or to speak to one of our experts.

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A PERSONAL APPROACH TO CORPORATE, DIGITAL & PRIVATE WEALTH SERVICES

No information provided by Affinity should be construed as specific VAT or taxation advice. All information provided is, to the best of our knowledge, correct at the time of writing.

Affinity are a regulated Corporate/Fiduciary providers, we are not professional tax advisors. Any information provided is based on our Company's many years of experience in the industry and practical knowledge of workable solutions. We propose tried and tested solutions which we have utilised and are happy to propose to potential clients.

We always recommend that clients obtain independent advice prior to committing to a structure. Should you wish to receive formal advice on any matters discussed, we would be very happy to obtain this for you from a third party which we work with or alternatively work with your preferred provider.



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