



Sovereign Family Office



[SovereignGroup.com](http://SovereignGroup.com)



CLARK

# INTRODUCING SOVEREIGN FAMILY OFFICE

Sovereign Family Office (SFO) is the division of The Sovereign Group that brings together a range of key wealth management tools to create a one-stop shop to manage the assets and meet the service needs of our high net worth clients and their families.

“A mechanism for the control and consolidation of family wealth.”

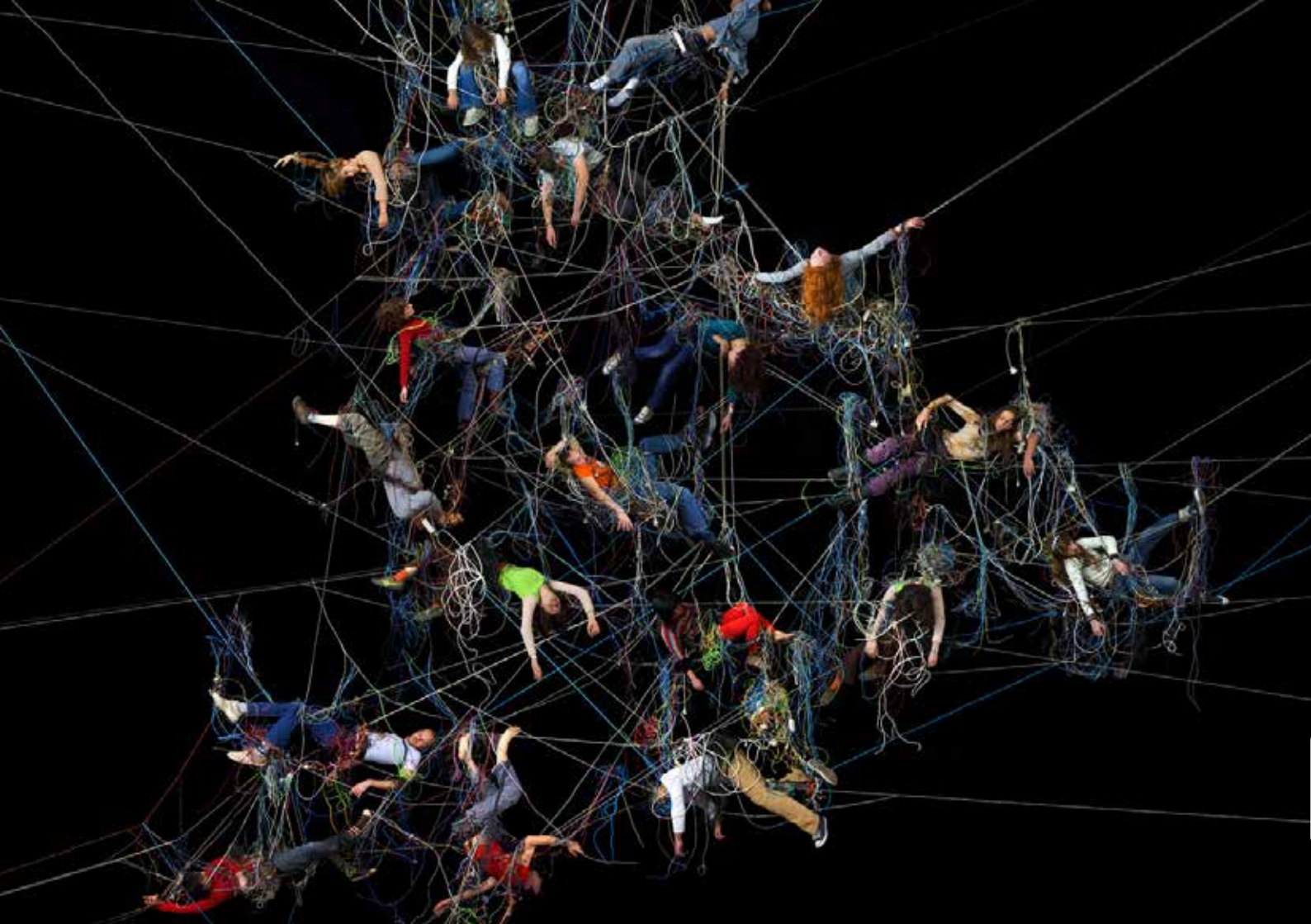
The overriding objectives for SFO are to provide clients with a mechanism for the control and consolidation of family wealth, a higher degree of confidentiality and to gain benefits of scale in terms of both buying power and operational efficiencies.

In addition to the investment-related and financial advisory services offered by Sovereign Asset Management (SAM), SFO is able to call upon the expertise and services of other Sovereign Group offices and subsidiaries in areas such as legal services, insurance, accounting and tax advice.

Established in 1987, The Sovereign Group’s core business is the setting up and managing of companies, trusts and other structures to meet the specific personal or business needs of our clients. Typically these needs would include tax planning, wealth protection, property ownership and facilitating cross-border business.

As a member of The Sovereign Group, SFO has direct representation in 25 countries worldwide and enjoys an excellent reputation for its professionalism, dependability and friendly efficiency.

Chris Wake  
‘Dali Is Not Crazy’  
Finalist:  
The 2008 Sovereign  
Asian Art Prize



# WEALTH PRESERVATION AND CREATION

“We will ensure that we fully understand your family’s needs and aspirations.”

The variety of commercial and personal interests within a high net worth family can be wide-ranging and changeable, while the expectations for performance and service quality are high. As an independent wealth manager, Sovereign Family Office will ensure that we fully understand your family’s needs and aspirations and then tailor our services – and those of any third-party providers – to ensure that these are fulfilled in the most integrated and cost-effective way.

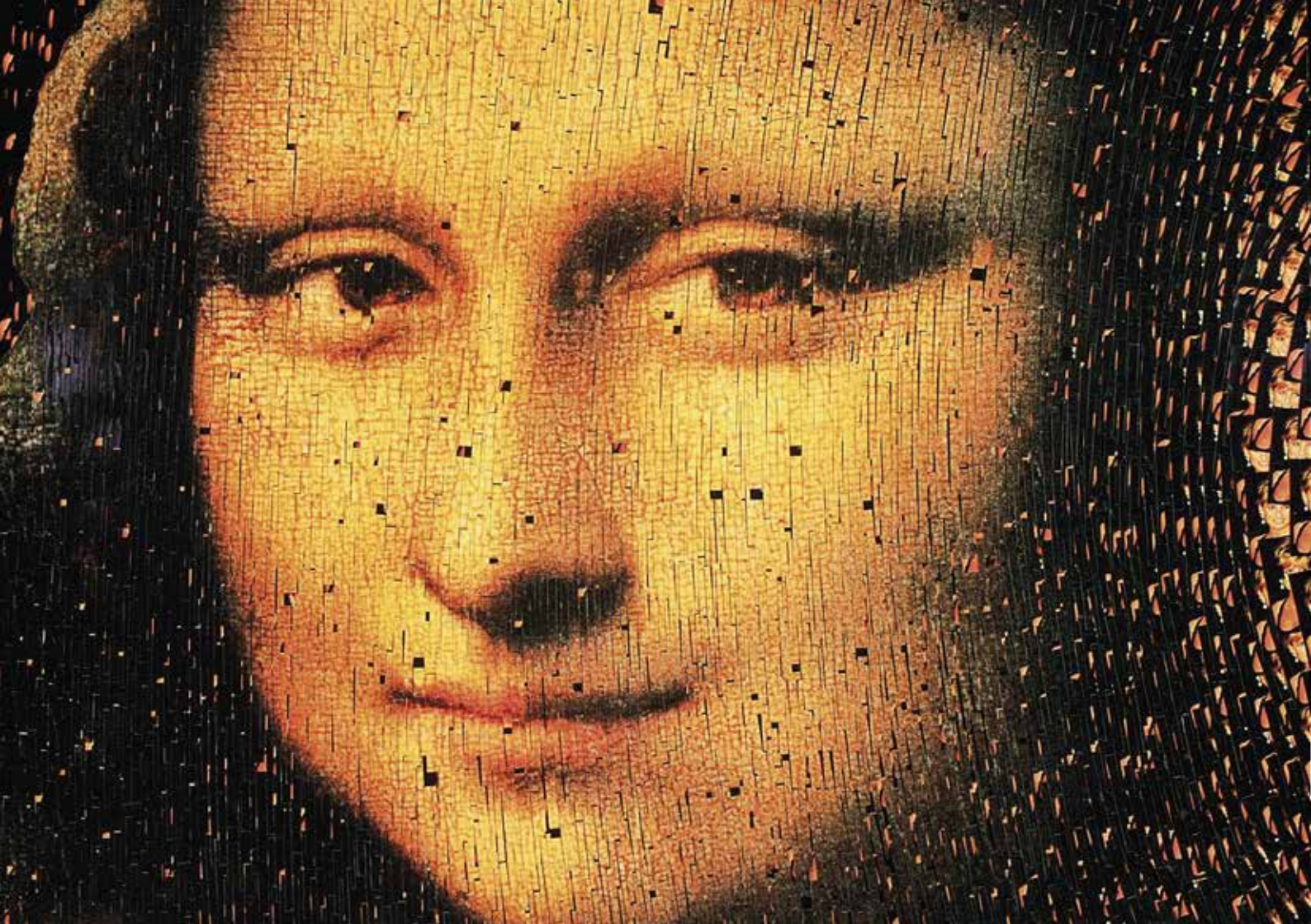
People are increasingly mobile and family members and assets may be spread all over the world. The global reach of the Sovereign Group enables SFO to provide local expertise on an international scale and allows our clients access to a global service from a local point of delivery. This means we can help families wherever they are – or wherever they want to be.

Our team of professionals is drawn from varied but complementary backgrounds, including asset managers, bankers,

lawyers, accountants and company and fund administrators. The depth of this collective strength enables us to interact independently with the wealth management industry and to tailor solutions for supporting families, partnerships and businesses worldwide.

SFO is committed to delivering a genuinely objective and impartial family wealth management service, as well as enhanced levels of oversight and security.

Daniel Canogar  
‘Enredos 2’  
Finalist:  
The 2008 Sovereign  
European Art Prize



# RANGE OF SERVICES

“A comprehensive range of wealth management services.”

Sovereign Family Office provides a comprehensive range of wealth management services:

- Private banking introductions
- Investment monitoring
- Reporting and record keeping
- Wealth management
- Fund establishment and management
- Accounting services
- Insurance services
- Property holding structures
- Tax and succession planning
- Trustee services
- Company incorporation and management
- Aircraft and yacht registration





# PEACE OF MIND

Sovereign Family Office has two strategic goals: to preserve existing wealth and enhance future growth.

“The common theme for all our clients is that they want sophisticated, independent and impartial advice.”

Every high net worth family is unique but many family office issues are similar – asset structuring, investments, global custody, due diligence, reporting, tax and succession planning, as well as family and corporate governance. We will consolidate the complexities of your family affairs and business interests into an integrated and well-regulated process that will assist all generations.

In addition to providing sustained, coordinated support to help your family manage routine financial affairs, SFO will consult on specific wealth planning issues as they arise. The common theme

for all our clients is that they want sophisticated, independent and impartial advice. Above all, confidentiality is always a priority.

Our valued relationships with private banks and investment managers are a prerequisite for SFO’s ability to provide individual and specialist advice. We will genuinely seek out the best services and opportunities to enhance your wealth, as well as to secure it.

SFO’s clients can be assured of the highest levels of attention and discretion at all times.

Andreas Hagenbach  
‘Euphoric Climate’  
Finalist:  
The 2009/10 Sovereign  
European Art Prize

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Simon Birch

'The Two  
Thousand Words'  
Four times finalist of  
The Sovereign Asian  
Art Prize



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Valentina D'Amaro  
'Untitled'  
Finalist:  
The 2009-10 Sovereign  
European Art Prize