

# Fiduciary Advice



**RMB**  
PRIVATE BANK

Traditional values. Innovative ideas

## Effective generational transfer of wealth

### ESTATE PLANNING DESIGNED BY A TEAM OF SPECIALISTS

Our team of Fiduciary Specialists use their specialist legal and tax planning skills to design and implement an estate plan that will not only ensure that you and your loved ones derive maximum benefit from your assets during your life time, but which will also provide for the effective transfer of wealth to the next generation.

Our suite of solutions include:

### OFFSHORE TRUST AND COMPANY STRUCTURING

The consolidation, management and asset protection of offshore assets form an important part of our estate planning solution. Offshore trust and company structuring solutions are offered through FNB International trustees, a Guernsey based trust company.

### TRUST PLANNING

Advice on the use of local and offshore trusts as well as the legal review of existing trust structures. Our specialist will make recommendations on the best type of trust to meet your specific objectives.

### TRUSTEE SERVICES

Our corporate trustee solution ensures that the trustee duties are performed in compliance with current legislation and best practices.

### BUSINESS SUCCESSION PLANNING

Our business succession planning includes the reviewing of existing business structures as well as considering existing and future ownership options. The aim is to ensure business continuity within the context of transferring ownership and retaining value for the next generation.

### WILL DRAFTING

We offer a Will drafting service to cover your estate in both local and offshore jurisdictions. A skilfully drafted Will forms the cornerstone of our estate planning service. Besides the appointment of your beneficiaries, your Will can also provide for the creation of testamentary trusts and the nomination of trustees as well as the nomination of guardians of your minor children.

### ESTATE ADMINISTRATION

Legislation pertaining to estate administration is complex and primarily designed to protect beneficiaries and creditors. This is a task that should only be fulfilled by qualified and experienced estate administration specialists. We offer estate administration services where we have been nominated as executor in a Will or through a power of attorney appointment.

### CONTACT US FOR MORE INFORMATION

As an RMB Private Bank client, you can use a channel that best suits your needs in order to apply for this innovative and customised solution:

- Call your Private Banker directly
- Contact the Service Suite on 087 575 9411, available 24 hours a day 7 days a week
- Visit [www.rmbprivatebank.com](http://www.rmbprivatebank.com)