

OFFSHORE CONSULTING SERVICES LIMITED (“OCSL”)



Specialist advisor to wealthy individuals and professional fiduciaries

OCSL provides independent and unbiased advice on almost any wealth planning product or solution

Problem solving is our specialty so take advantage of our independent vetting service.

Use OCSL's vast network of professional contacts to establish “tax optimised” wealth planning structures for any client in any jurisdiction

Take advantage of our training services

www.offshore-consulting.net

INDEPENDENT ADVISORY SERVICES

OCSL is a Bahamas IBC that was incorporated in 1996 and has changed little in operational function since.

OCSL was formed with the intention that it would provide wealth planning advice to individuals and specialist advisory services to Fiduciaries including Trust Companies, Family Offices, Wealth and Asset Managers, Law Firms and Tax Advisers. OCSL also works with such Fiduciaries, as well as for them, as it has a number of joint ventures in effect.

OCSL's founder is Ed Rogers, a senior trust practitioner, who commenced his financial services career in January 1988. Since then Ed has enjoyed the experience of working in more jurisdictions than probably any other trust professional, which has provided him with first-hand knowledge of most entities that are used in wealth planning today. That also means that Ed is very well connected to other trust professionals worldwide and that OCSL is competent to advise fiduciaries with solutions structuring for their clients. OCSL specializes in providing innovative and unique wealth planning solutions and we are also happy to provide problem solving services for a wide variety of wealth planning structures. Trusts and trust alternatives are Ed's particular specialty as few senior trust lawyers have as much “hands on” trust administration experience as Ed has.

OCSL works mainly with boutique fiduciaries that do not have the knowledge resources and/or professional experience of larger organizations but we offer our services to all types of clients including large trust groups as well as private individuals.

EDWARD (“ED”) ROGERS



Ed is a British citizen but long-term expatriate who has been the Managing or Senior Director of 10 trust companies in 7 jurisdictions during his financial services career.

For most of his career Ed worked for multi-office Trust Groups, such as the Trident Trust Group and the Intertrust Group, and has been the senior manager/director of branch offices and trustee companies in the Caribbean, Europe, Asia, Australasia and the Middle East. From 2005 to 2010 he was the Head of Trust Services for the Amicorp Group. Subsequently he served with Amicorp, as a trust specialist consultant, but has concentrated on expanding the services of OCSL, since the Amicorp association ended in January 2012. Although he was still able to fit in a one year contract serving as the Managing Director of a trust company in Dubai during most of 2013. As a result of Ed's efforts OCSL now acts as an external consultant to a number of fiduciary firms and also has joint venture arrangements in effect with some others. Ed works out of his home office in the Isle of Man but is often on assignment elsewhere.

OCSL believes in totally risk managed solutions for all of our clients. All services and solutions are offered in complete confidentiality for the clients' benefit.

For further information please contact us at info@offshore-consulting.net

OFFSHORE CONSULTING SERVICES LIMITED (“OCSL”)

OCSL’s Services

Advisory services

- Wealth and estate planning advisory services;
- Independent review of wealth planning structures including vetting of trust deeds and other legal documents;
- Facilitation of sophisticated multi-jurisdiction structures;
- Administration advice for trust and foundation structures;
- Considering trust alternatives such as hybrid trusts, funds, insurance and pensions;
- “Retainer fee” services (free advice for low retainer fee).

Solutions structuring

- Trust/Trustee* services and advice for most jurisdictions;
- Private Trust Company (PTC) services and advice for all PTC jurisdictions;
- Drafting of trust deeds and other trust establishment and/or administration documents;
- Providing precedents for trust establishment & administration;
- Tax optimization solutions for HNWIs
- Establishment of “white label” trustee companies and other corporate solutions that permit provision of trustee services without obtaining a trust license.

**OCSL is not licensed to provide trustee services directly which means that trustee services are provided by trusted affiliates that have been vetted by OCSL.*

Networking

- Introductions to professional service providers, including tax lawyers, plus influencing reduced fee quotes for services desired;
- Assistance with the incorporation and administration of various corporate entities, including funds, in many jurisdictions, as well as the establishment of trusts, PTCs, foundations and hybrid entities.

Problem solving

- Forensic trust reviews & auditing plus rectification advice (particularly for “potential/actual problem” trusts);
- Trust financial statements reviews and advice;
- Rectification advice for breach of trust and other problems issues for trustees and corporate service providers.

Training Services

- Establishing trust and other wealth/estate planning structures;
- Comparisons between trusts and foundations;
- Implementation and administration of trust and foundation structures.

Representative Services

- Independent Trust Protector services;
- Independent director services (individual or corporate);
- Nominee shareholder services.

Other services

- Provision of trust expert personnel for short and long term contracts (subject to availability);
- Mutual benefit joint venture arrangements with fiduciaries that wish to provide trustee and other fiduciary services utilizing OCSL’s expertise.

OCSL’s Clients

Our clients are very important to us and we endeavor to offer them the best service possible with fast response times to enquiries and a very professional delivery for any services requested. Indeed we still believe that a fiduciary must always have a “what can we do best for our clients?” approach to service. So OCSL will not take on a request for services unless we are 100% confident of effective delivery. We also offer a bespoke service to our clients tailoring the services offered to their exact needs. As a consequence any initial enquiry is free of charge and we offer further services subject to an agreed quote. We also don’t “nickel and dime” our clients so only charge fees for proven value added service. (No client has ever accused OCSL of “overcharging”). Most of OCSL’s clients are small fiduciaries that don’t have in-house personnel with Ed’s long experience and knowledge. But OCSL also works with larger organizations that require specialist expertise for projects or in-house training and with individual clients that welcome independent advice.

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