

# OFFSHORE CONSULTING SERVICES LIMITED (“OCSL”)



*International wealth planning advice for HNWIs and fiduciary clients.*

*OCSL delivers 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](http://www.offshore-consulting.net)

## INDEPENDENT ADVISORY SERVICES

OCSL is a Bahamas IBC that was formed in August 1996 and has enjoyed more than 20 successful years in business to date.

Since inception OCSL has provided wealth planning advice to affluent individuals as to how they should hold and structure their assets and investments.

OCSL also provides specialist advisory services to Fiduciaries including Trust Companies, Corporate Service Providers, Family Offices, Asset Managers, Law Firms, Private Bankers, Financial Advisers and Tax Specialists, as OCSL’s founder, Ed Rogers, has unmatched multi-jurisdiction expertise. In fact, he believes that he is the only trust practitioner, in the whole world, who has held senior level positions in 16 jurisdictions to date.

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 expertise 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 that may need to outsource certain functions and/or projects.

OCSL also provides training and mentoring services to financial services professionals and the firms that employ them.

## EDWARD (“ED”) ROGERS



Ed is a British citizen, who was born in Nigeria and spent his formative years, in the Northern city of Kaduna, before his family relocated to the UK. Living in various English counties, Ed went

on to obtain his educational and professional qualifications, from UK institutions, although he has spent the entirety of his financial services career living outside the UK.

For a major portion of that 30-year career, Ed worked for large multi-office Trust Groups, such as the Trident Trust Group, the Intertrust Group and the Amicorp Group, as well as a few smaller Groups. Ed has served as the senior manager/director of branch offices and trustee companies in the Caribbean, Europe, Asia, Australasia and the Middle East. He was also Head of Trust Services for both the Amicorp Group and the T&F Tax and Finance Group.

In recent times, Ed has expanded the services that OCSL offers and has also formed a subsidiary company called US Trust Advisory Services LLC, which delivers legal and tax advice for US trusts and US corporate entities. As a consequence, he was recently appointed as the North America regional President for the ADAM Global network and he also serves as a Partner of Global Legal Group, which provides legal services within and without the UAE. Ed is also a regular contributor of articles on LinkedIn and other network forums.

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## OCSL’s Services

### Advisory services

- Wealth and estate planning advisory services including investment optimization;
- Helping clients to establish sophisticated international structures, which are tax efficient, including multi-jurisdictional solutions;
- Assisting with the establishment of bank and/or investment accounts in various jurisdictions;
- Delivering administration advice for trust and foundation structures;
- Providing advice on all international corporate entities including foundations, funds, special purpose vehicles and hybrid entities.

### Trusts expertise

- Advising on the establishment and administration of all kinds of trusts, including US trusts, and exploring trust alternatives such as insurance and pensions.
- Private Trust Company (PTC) services and advice for all PTC jurisdictions;
- Establishment of “white label” trustee companies and other corporate solutions that permit fiduciaries to have “physical presence” without obtaining a trust license.
- Drafting of trust deeds and other trust establishment and/or administration documents;
- Delivering guidance for trust establishment & administration.

### Representative Services

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

### Training Services

- Delivering workshops and seminar presentations, which are trust focused, to financial service professionals (FSPs) or the firms that employ them;
- Providing one on one mentoring and career advice to junior and mid-level FSPs.

### 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.

### Special Projects

- OCSL will accept projects from fiduciary organizations even if the OCSL CEO is required to work overseas on assignment to fulfil the engagement;
- OCSL will also carry out research tasks that are financial services related.

### Other services

OCSL will consider any other service request including joint venture relationships.

## Service to Clients

OCSL offers excellent service to its clients with fast response times and professional delivery for any services requested. We try to treat every client as if he/she was a personal friend because 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 “out of the box” thinking plus a bespoke service offering that tailors the services required to a client’s exact needs. As a consequence, any initial enquiry is free of charge and we only deliver further services subject to an agreed quote. In addition, OCSL doesn’t “nickel and dime” its valued clients, so we only charge additional fees for proven value added services. Most of OCSL’s clients are high net worth individual clients, or boutique fiduciaries, who value independent and confidential advice, although OCSL also works with larger organizations that require specialist expertise for projects or in-house training.

OCSL provides totally risk managed solutions for all of our clients. We offer a fast and friendly service and all solutions are delivered in complete confidentiality for a client’s benefit.

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