



# Intertrust Reads Private Client Limited Taxation Services in Guernsey



"Emigration can be a stressful and complex process. However, our experience allows us to take the pressure off you and assist you with the process as well as provide the necessary tax advice."

Marie Cassidy - Manager



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"In recent years UK finance acts have made the taxation of offshore trusts and anyone connected with them increasingly complex. It is therefore now more important than ever that trustees maintain detailed records to assist their tax advisers in the compliance and advisory process."

Mark Stone - Manager



Mark Stone - Manager

"Our team is highly professional and experienced in taxation services. Most have attained or are training towards professional tax qualifications. Our profession means that we need to keep up to date with the ever changing world of taxation by attending seminars and holding in-house technical sessions."

Paul O'Neill - Manager



Paul O'Neill - Manager

"We are unashamedly a people business. We believe in creating long term relationships with our clients and become a central part of their professional team."

Julian Turian - Manager



Julian Turian - Manager

Our clients know what they want to achieve. We know how to get there. Working with some of the sharpest minds in the business, we pull together the right blend of advice to suit each client's unique situation. With an international network of experts and a rich history in the financial world, we have the people and knowledge to help you succeed. Partnership, premium quality and personal attention. That's how we've remained a leader in Taxation Services for such a long time.

There are many benefits in using an international finance centre to manage exposure to taxation. But what sets Intertrust Reads in Guernsey apart from other companies and other jurisdictions? Although we will attempt to answer your questions here, experience tells us that the best way is to meet, face to face to demonstrate this to you. You will want to get to know us. We want to get to know you. Only then can we offer you the best solutions and more personal, focused advice. Our principal aim is the protection of your wealth.

#### Why Guernsey?

Guernsey is a low tax area. It is one of the world's leading financial centres - a reputation built-up over many years as a result of innovation and up-to-date legal framework. The island's finance industry is supported by an excellent infrastructure of international-standard legal and accounting services. Guernsey is a stable and secure environment where you can be confident that you will get the very best service and expertise.

#### Why Intertrust Reads in Guernsey?

Our taxation services company, Intertrust Reads Private Clients Limited, is well-placed to steer you through the complexities of managing your taxation liabilities.

We offer much more than traditional tax services. We are experts in a specialist range of tax and related subjects. Unashamedly very focused, we offer unparalleled expertise in managing the taxation affairs of our clients.

We are one of the few firms in the Channel Islands to hold Chartered Tax Adviser status. We are also part of the BDO international network, giving us access to worldwide taxation information.

#### Our approach

We are committed to long-term relationships and building trust with a dedicated team. A director will take overall responsibility for your affairs whilst a manager and an administrator handle matters on a day-to-day basis. All are

tax professionals offering experience and working knowledge at every level.

We pride ourselves on creating innovative solutions. Thinking laterally about your needs, not just offering you a "one size fits all" approach as many do. Our response times are among the best in the business.

We also understand how important it is to have continuity in any relationship. Not only are our staff loyal but they're also highly qualified, with most having attained or working towards professional qualifications.

#### Our services

- ▶ Guernsey and UK Tax Advice
- ▶ Residence and Domicile Issues
- ▶ Emigration and Immigration Planning
- ▶ Guernsey and UK Tax Compliance
- ▶ Trust Taxation (offshore/onshore)
- ▶ Estate Planning and Executorship Services
- ▶ Real Estate Structures

Taxation is just one of the disciplines within Intertrust Guernsey. Trust and Corporate Services and Fund Management are also available.



#### Jane Le Maitre - Managing Director

Jane qualified as a Chartered Accountant in 1987 with a Big 4 firm of accountants in the UK and went on to become a member of the Chartered Institute of Taxation. She moved to Guernsey to join KPMG in 1989, becoming a member of the Society of Trust and Estate Practitioners and a partner of the firm with responsibility for private client (UK and Guernsey) tax planning and management of a large and varied portfolio of offshore trusts and companies for high net worth individuals.

Jane joined the Group as a tax and trust director in 2005 and is currently President of the Guernsey Society of Chartered and Certified Accountants having spent ten years as Chairman of the Taxation Sub-Committee. She became managing Director of Intertrust Reads Private Clients Limited in January 2007.



#### Simon Graham - Director

Simon joined the Group in the Audit department in 1992 and moved to the Tax Department in 1995. Simon was made a Manager of the Tax Department in 1999 and director of Trust and Tax in 2003.

Over the past 14 years Simon has advised his portfolio of high net worth clients on UK and Guernsey tax issues and has increasingly specialised in advising UK property structures using a variety of vehicles including SPV's funds, PCC's and partnerships.

Simon is a Director of Intertrust Fund Services (Guernsey) Limited and is a member of the Chartered Institute of Taxation.



#### Fran Snoding - Director

Fran has many years experience in the Guernsey finance industry, initially working for a small accountancy practice dealing with the administration of offshore companies and a further six years with the Guernsey Income Tax Office, where he was a Senior Tax Officer.

For more than 10 years he has worked for the Group in Guernsey, where he is a Director responsible for providing tax advice to a portfolio of High Net Worth Individuals. In addition Fran also advises upon the tax efficient formation of trust and company structures on the planning and formation of trust and company structures. Fran has spent time on the Tax Sub-Committee of the Guernsey Society of Chartered and Certified Accountants and contributes articles on various tax and financial issues to a wide range of publications.



**Neil Dorey - Director**

Neil started his working career with Reads & Co in 1981. He qualified as a member of the Institute of Chartered Secretaries and Administrators in 1994 and was appointed as Manager within the Taxation department in 1996.

Neil has a wide portfolio of individual and corporate clients and is responsible for the taxation affairs of many high net worth clients. Neil has a wealth of Guernsey tax experience from his 25+ years with the Group and has acted as Group representative on the Taxation Sub-Committee of the Guernsey Society of Chartered and Certified Accountants.

Neil contributes to several tax publications and also writes tax technical articles for our own in-house newsletters and connector publications. Neil also has responsibility for the Group's own taxation affairs, managing and advising upon both compliance and structuring issues.



**Michael Ayre - Director**

Mr Michael Ayre joined the former BDO Reads, a Guernsey chartered accountancy practice, in 1987 progressing to his appointment as a tax partner in 1991. Subsequent to the purchase of the fiduciary, investment and taxation divisions of BDO Reads by Fortis in 1999, Michael was appointed as the Group Managing Director of Fortis Guernsey in 2003, a position he held until February 2009.

Michael continues to work for the Group as a director of their private client business, providing financial and taxation advice to financial institutions and banks to high net worth individuals and their families based primarily in the UK and Guernsey. Prior to joining BDO Reads, Michael was employed by KPMG in Guernsey and Touche Ross in London. Michael also holds a number of non-executive board appointments of both public and private companies.

Michael is a Chartered Tax Adviser and a Fellow of the Association of Chartered Certified Accountants.

**The next step**

We are confident that Intertrust in Guernsey can deliver fiduciary and taxation services you need and would encourage you to make contact. You will want to get to know us. We need to get to know you.

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Fran Snoding  
fran.snoding@intertrustgroup.com

Jane Le Maitre  
jane.lemaitre@intertrustgroup.com

Neil Dorey  
neil.dorey@intertrustgroup.com

**Intertrust Reads Private Clients Limited**

P.O. Box 119  
Martello Court, Admiral Park  
St. Peter Port, Guernsey GY1 3HB  
tel +44 (0)1 481 211 000  
fax +44 (0)1 481 211 001

guernsey@intertrustgroup.com

www.intertrustgroup.com

Our clients come from every corner of the globe. Different countries, different cultures. Just like us. We have more than 1,000 professionals in more than 20 countries worldwide. So we have the local knowledge and sensitivity to see things from your point of view.

Setting the standard since 1952