



LEGIS

GLOBAL FINANCIAL SOLUTIONS

LEGIS | *Wealth*

Client Focus | Expertise | Trust

www.legisgroup.com





Legis Group Overview

Headquartered in Guernsey, the Legis Group has been helping institutional and private clients for over 30 years. For institutional clients we establish and administer multi-jurisdictional corporate, trust and fund structures. We also provide a range of bespoke services to private clients.

Legis Vision

The vision for the Legis Group has three components:

-  **Client Focus** – We aim to be the service provider of choice, where proactive, dedicated client service is standard
-  **Excellence in execution** – We will meet and exceed our customer and regulatory needs – maintaining the highest standards, reputation and performance
-  **Employee engagement** – We will ensure that our people are engaged and have access to the tools, information and training they need to perform their jobs, develop their careers and meet the exacting needs of our clients






Why Legis?

-  **Focus** – We specialise in servicing the unique needs of investors with offshore structures – corporations, investment managers, institutional investors and private clients – backed by a 'what more can we do?' philosophy
-  **Experience** – We have over 30 years' experience in servicing complex offshore structures and a professionally qualified team
-  **Technology** – We recognise the fundamental role of technology in the servicing of complex offshore structures. We commit approximately 15% of our operating expense budget to technology






With over 30 years' experience in the management of family wealth, LEGIS | Wealth understands the unique needs of private clients. Our experienced, qualified staff recognise the need to meet the individual expectations of private clients. Our service is focused on meeting those expectations.

Services

-  Family trust administration, full trusteeship services
-  Company administration including offshore property holding vehicles and trading companies
-  Charitable trusts
-  Private trust company structures
-  Special purpose vehicles

Examples of Services provided to our private clients

-  Family trusts – management of the legal, technical and investment aspects of multi-million dollar trusts
-  Trusteeship – acting as co-trustee for a number of long-established family trusts
-  Property ownership – through the establishment of appropriate trusts that allow for the transfer and leaseback of significant commercial property

"I believe the Legis Group is one of the stars of the trust world. Their staff look after clients and peers as though they were their own family."

Karen Jones, Citywealth editor

"In an uncertain age, we endeavour to bring a sense of stability and permanence to the management of family wealth."

Senior Management Team

Stuart Platt-Ransom – Group Managing Director

Stuart Platt-Ransom is the Managing Director of the Legis Group, a role to which he was appointed in July 2007. Stuart spent the previous 12 years with State Street Corp in its South Africa, Luxembourg, Dublin, London and Guernsey offices in various management, operational, business development and relationship management roles. Prior to that, Stuart worked for GAM in the Isle of Man. Most recently, Stuart was the Managing Director of State Street's business in Guernsey and was responsible for its business in Africa from 2002 to 2006. Stuart serves as a director on the Legis Group companies and in addition holds a number of external directorships on listed private equity & property company structures as well as a Guernsey based investment management company. Stuart is a Chartered Fellow of the Chartered Institute for Securities & Investment, a Chartered Manager and Fellow of the Chartered Management Institute, a Fellow of the Institute of Leadership & Management and a Fellow of the Institute of Directors; he is a British and South African citizen and is a resident of Guernsey.



Alison Parry – Managing Director, Trust & Corporate

Alison has more than two decades' experience in the offshore financial services industry. She trained with Coutts & Co before moving to an international banking institution where she led a team that specialised in providing offshore structures for high value international clients, with a particular focus on North America. Alison returned to Guernsey in 2007, after a secondment to Hong Kong, to run the Guernsey fiduciary operation at Barclays Wealth (formerly The Walbrook Group). She joined Legis Group to head up the trust and corporate services division. Alison is a Fellow of the Institute of Chartered Secretaries and Administrators and a Member of the Society of Trust and Estate Practitioners.



Adrian Relph – Director, Trust & Corporate

With extensive experience in the offshore finance industry, Adrian started out his career with Kleinwort Benson, within the Fiduciary division. Moving to Deutsche Bank to gain international exposure he headed a team with particular focus towards Latin America. Along with heading up Fiduciary teams within the Guernsey and Geneva office, he was responsible for many of the Group's most important client relationships, being involved in the provision of fiduciary as well as the bank's private client, banking and investment services. Adrian is ACIB as well as STEP qualified.



John Morris – Director, Trust & Corporate

John joined the Legis Group having spent the previous six years at Barclays Wealth in Geneva, the last three as head of wealth structuring, prior to which he gained significant experience of offshore jurisdictions with secondments to the British Virgin Islands, the Cayman Islands and Guernsey. From his early grounding in trust and funds, John has focused on managing relationships with high net worth clients. This included complex financial reporting to international client bases in the Middle East, Latin America, Africa, Central Europe and the UK. John is a Fellow of the Institute of Chartered Accountants in England and Wales (FCA).



Samantha Renouf – Associate Director, Trust & Corporate

Samantha was born and educated in Guernsey and began a career in accountancy in 1984. During her 24 years with Rawlinson & Hunter, where she was a director, she focused on high net worth individuals and family office arrangements with complex accounting requirements. Samantha assisted in the establishment of Rawlinson & Hunter's Monaco operation and after living and working in the Principality she returned to Guernsey and joined Legis in April 2009. She was appointed Associate Director on 1st January 2010 and takes direct responsibility for the Trust and Company Department with an equal focus on internal processes to ensure continued excellence of service. Samantha is a member of STEP and has held the position of secretary of the Guernsey Branch.





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