

# Family office services

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# Family office Advisory and implementation services

We provide a suite of solutions for establishing a single family office (“family office”) in the Hong Kong SAR that offer one-stop end-to-end family office services.

We provide a wide range of family office services tailored for your specific case and investment arrangements. From assistance in sorting out and selecting suitable assets, advice on operations and shareholding, to design of a structure eligible for tax incentives. We can advise on the most tax efficient asset restructuring plan, and assist in subsequent implementation (company incorporation, preparation and review of family office documents, among others)



## Family office set-up planning advisory



Develop a suitable plan for setting up a family office, ranging from family office functions, an operating model, the location, internal management structure, management systems, staffing, reporting systems, and future development plans.

## Family office establishment



Based on the chosen architecture and structuring path, we can prepare detailed steps for structuring a family office, the tasks to be completed, and a timeline to assist you in implementation.

## Hong Kong tax incentives eligibility analysis



Arrange conditions for claiming benefits under the tax preferential policy (“tax incentives”) applicable to single family offices in the Hong Kong SAR. Analyse the eligibility for tax incentives in view of your exiting investments and their structures. Provide specific and practical optimisation advice on meeting the conditions and points to be noted.

## Investment holding structuring



Analyse and advise on the tax risk of your existing structure of investment holding. From the perspective of tax incentives, we comprehensively consider the commercial feasibility, future investment returns, exit, and inheritance arrangements. We then design a suitable structure for investment holding to achieve personal, family and corporate tax optimisation.



## Tax advisory on asset restructuring

Analyse the tax implications of structuring your target entity in relevant jurisdictions, and advise on the most tax efficient restructuring path.

## Family office document preparation and review



Assist you in preparing and reviewing investment management agreements, employment contracts, and other documents required for establishing a family office. From the perspective of tax incentives, review important family office management documents, and advise on documentation and filing to minimise risks.

## Advice on related party transaction (RPT) pricing and transfer pricing (TP)



Advise on RPT services and pricing involved in family office structure. Conduct comparability analysis and maintain TP contemporaneous documentation in accordance with TP rules and regulations, with reference to similar arrangements in the same industry.

## Advance ruling from the Inland Revenue Department (IRD)



To provide more certainty, we can assist you in applying to the IRD for an advance ruling on the eligibility of the proposed family office structure and arrangement, as required.

## Tax treaty treatment analysis



Analyse the eligibility of selected structures and investment holding tools for tax treaty treatment, and advise on the identity of the investor as a tax resident and a beneficiary owner.

# Family office Value-added services

Each family office differs in its background and demands. We are pleased to provide tax, finance, investment policy, and other value-added and implementation services to meet the demands of the sophisticated services involved in the process of establishment, operation and subsequent compliance.



## Company incorporation

We can coordinate with a third-party corporate secretary in company incorporation, as required.



## Executive search and recruitment services

Search and recruit the talent required by your family office.



## Hong Kong visa advisory and application services

Advisory and application services for Hong Kong SAR visa (Top Talent Pass Scheme, Quality Migrant Admission Scheme, Admission Scheme for Mainland Talents and Professionals, General Employment Policy, Capital Investment Entrant Scheme, etc.)



## Accounting and bookkeeping

Monthly and annual accounting, bookkeeping and financial statements preparation services for Hong Kong companies structured as a family office.



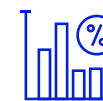
## Payroll management

Services for Hong Kong companies structured as a family office for employee payroll management, establishment of the Mandatory Provident Fund (MPF), and preparation and submission of the employer's return. We can also provide Hong Kong Salaries Tax compliance services to individual employees, as required.



## Corporate compliance services

Hong Kong profits tax return filing services for Hong Kong companies structured as a family office.



## Tax residency analysis for family beneficiaries

Arrange your existing tax residency, analyse the tax risks and implications of your holding of overseas equity interests or investment structure, and the returns generated under the current tax residency. We will provide practical advice on optimising tax residency and things to be noted during each stage.



## Corporate and individual Hong Kong tax residency and taxpayer identification application

Hong Kong tax residency and taxpayer identification application services provided to companies and individuals.



## Family office investment policy advisory

Assist you in formulating the investment policy, draft an investment policy statement, and communicate and adjust the proposed investment policy with stakeholders and the core management of a single family office.



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