



# Family Office and Private Client

KPMG Islands Group

The KPMG Islands Group Family Office and Private Client team is a leading provider of tax, advisory and assurance services across the Crown Dependencies, Bermuda, Cayman Islands, British Virgin Islands and Bahamas. Across the KPMG Islands Group, we work as one team, are jurisdictionally agnostic and are completely focussed on what works best for the families we work with, their businesses and their wealth management structures.

Our team is part of the KPMG Global network, and this allows us to offer genuinely global solutions through a single team on the ground in our local jurisdictions. In addition, being the gateway to our international network, which operates in 143 countries, enables us to work with our international partners to understand the value and opportunity that our islands can offer the right families and help them to make appropriate choices of what will work best and who best to implement their objectives.

Our aim is to clearly articulate and excel at what we do. We work closely and partner with businesses where we complement one another to best serve the families we work for, and this includes onshore and offshore lawyers, trust and company service providers, banks and wealth managers. The success of our business is based on the quality and strength of relationships we build both with the families we work with and the intermediaries we collaborate with to serve them.

## Services to High Net Wealth Families, Family Offices, and Trust and Company Services Providers

Local, UK, US and international tax compliance services for individuals, corporate entities, trusts and foundations.

Specialist tax structuring advice on setup or unwinding or transaction specific.

Relocation, residence, expat and foreign domiciliary planning.

Worldwide estate planning and advice on asset protection, succession, legacy.

Luxury asset tax planning including aircraft and yachts.

Tax investigations and remedial work regarding tax authority enquiries or disclosures.

FATCA/CRS advice and reporting.

Family office consulting regarding ESG, governance, philanthropy, diversity, succession, asset protection and legacy.

Bookkeeping and preparation of financial statements, accounting advisory services.

Audit and assurance services.

## Contacts



**Paul Beale**  
Head of Family Office  
and Private Client  
Guernsey  
+44 (0) 1481 755798  
[paulbeale@kpmg.com](mailto:paulbeale@kpmg.com)



**Joseph Milward**  
Manager  
Guernsey  
+44 (0) 1481 755719  
[jmilward@kpmg.com](mailto:jmilward@kpmg.com)

