

# OFFSHORE CONSULTING SERVICES LIMITED (“OCSL”)



*International wealth planning advice for HNWIs, corporate entities & fiduciaries.*

*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 optimized” 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 25 successful years in business to date. It is also now the lead company in the OCSL Group, which specializes in wealth planning for international clients from multiple jurisdictions.

We also deliver US wealth planning services courtesy of OCSL's subsidiary *US Trust Advisory Services LLC* and that includes US tax advice.

The Group's focus is to deliver tax efficient structures for trading, investing, asset holding and asset protection as well as estate planning.

OCSL's clients and business partners include Trust Companies, Corporate Service Providers, Family Offices, Asset Managers, Law Firms, Private Bankers, Financial Advisers, Digital Asset Advisors, Tax Specialists and Fintech entrepreneurs.

OCSL specializes in providing innovative and unique wealth planning solutions as we are multi-jurisdiction, courtesy of our business partners, and we engage in “out of the box” thinking

Trusts and trust alternatives are a particular expertise as no senior trust lawyer has the “hands on” trust administration experience of our CEO.

As well as trusts, we also assist to form foundations, funds and special purpose corporate entities in all financial center jurisdictions and deliver necessary support services including opening bank accounts.

OCSL specializes in non-regulated entities to reduce compliance pain and costs, for our clients, as OCSL is also a non-regulated entity.

Feel “free” to utilize our free initial enquiry service.

## EXPAT TAX EFFICIENCY SERVICES



OCSL's founder, Ed Rogers, is the only trust professional (TEP) to have held senior-level roles in 17 jurisdictions.

As a consequence, he spent much of his career as a tax nomad expatriate and has been able to organize his business and personal affairs, to significantly reduce his income tax burden, during a 35-year financial services career.

Ed now shares his tax-deferral secrets with a select group of clients, as a willingness to relocate and/or to explore second residency/second citizenship options are central to expat tax efficiency.

Expat tax efficiency can ultimately only be achieved by using various types of corporate entities, and also trusts, and OCSL is expert in most entities that are used in wealth-planning today.

OCSL also assists corporate clients with cross-border trading activities, which may also require the use of special purpose corporate entities, and we assist with establishing bank and/or forex accounts, as well as obtaining tax advice that may include tax treaty benefits.

OCSL delivers support services including director, manager, shareholder and trustee services that complement our tax efficiency solutions.

Ed is also the CEO of a Group that delivers protector services to trusts and private foundations.

# OFFSHORE CONSULTING SERVICES LIMITED (“OCSL”)

## OCSL 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 for trading & investment purposes.
- Assisting with the establishment of bank, investment or forex accounts.
- Delivering advice on the establishment of all international corporate entities including foundations, funds, special purpose vehicles and hybrid entities.

### Trusts/foundations expertise

- Advising on the establishment and administration of all kinds of trusts & foundations, plus exploring trust alternatives such as insurance and pensions.
- Private Trust Company (PTC) services and advice for all PTC jurisdictions.
- Drafting of trust deeds and other supporting documents for trusts and foundations.
- Guidance for trust/foundation administration.
- Dealing with tax/accounting issues for trusts.
- Provision of trustee and foundation council services by OCSL subsidiary.
- Corporate protector services delivered by partner group.

### Representative Services

- Independent director/manager services (individual or corporate).
- Nominee shareholder services.
- Nominee director/manager services.
- US citizen nominee.

### 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.

### Consultancy Services

- Multi-jurisdiction Fiduciary Consultant service delivered to fiduciary organizations in multiple-countries.
- OCSL will also carry out research projects that are financial services and/or fiduciary services related.

### JV relationships

OCSL will consider requests to act as a joint venture partner in a fee sharing relationship.

## 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 is a personal friend because we still believe that a fiduciary should adopt the services mantra of “what can we do best for our clients?” Thus, 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. That means that 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. Although we mostly work with affluent individuals or boutique fiduciaries, who value independent and confidential advice, we also engage 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.

[www.offshore-consulting.net](http://www.offshore-consulting.net)