



SENTIENT

Isle of Man Foundations: An Excellent Choice for Asset Management and Estate Planning

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Wealth can be a reward, a privilege or the result of good fortune.

The prudent and sophisticated take care of their wealth, to protect it from outsiders, invest it and put it to work, prevent it from bringing family problems, and direct its management and distribution, even after death.

A Foundation provides many of the advantages of a trust or limited company but can also serve a similar purpose to a private or charitable trust. They are an attractive vehicle for managing wealth and for the purpose of succession planning but can also be used commercially or by those uncomfortable with common law trusts.

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Key Features

- Established under the Foundations Act 2011.
- Is a registered legal entity.
- Combines features of trusts and companies for tailored governance.
- Can be used for private or public purposes.
- No requirement for local council members.
- Can last indefinitely.

*Designed for flexibility in managing private wealth
and charitable activities.*

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Why Choose the Isle of Man?

- Political stability.
- High standards of regulation – regulated by the Isle of Man Financial Services Authority.
- Favourable tax regime – 0% corporate tax, 0% capital gains, 0% withholding tax, 0% inheritance tax.
- Access to a wide range of investment opportunities.
- OECD whitelisted and compliant.
- Experienced and professional workforce.
- Globally respected jurisdiction.

The Isle of Man is renowned for its forward-thinking regulatory environment and business-friendly atmosphere.

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Uses

- Succession planning
- Estate planning
- Philanthropy
- Asset holding and protection
- Tax efficiency

Benefit from a solid legal structure that ensures security and compliance.

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Setting Up A Foundation

- Two constitutional documents – Foundation rules and Foundation Instrument.
- Foundation Instrument – sets out details of the foundation such as its name, objects, officers i.e. council members and registered agent.
- Foundation Rules – sets out details of how the foundation will be operated and managed, tailored to a foundation's specific objectives and purpose.

Begin with clarity and precision to ensure your foundation serves its purpose effectively.

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if you found this useful.

To discover how we can assist in safeguarding your assets and fulfilling your philanthropic goals, get in touch at:



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