



Trust & Foundations

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Trusts

The most widely used vehicle for asset protection is a Trust. A variety of assets can be held in a trust including immovable assets, stocks and shares, investment products, real and intellectual property, bank deposits and life insurance policies. We can assist you to protect your wealth and assets and save estate duty.

Trusts are a powerful planning tool. While each case is different and must be evaluated on its facts, some of the more common benefits of trust are described below. These are provided simply for guidance and professional advice must be sought before establishing a trust for any purpose.

- Asset protection
- Tax planning
- Avoiding probate
- Confidentiality
- Avoiding forced heirship
- Estate planning
- Long term Planning
- Preserving family assets
- Business succession

Foundations

The most important vehicle for wealth management and wealth preservation is a Foundation. A Foundation is a separate legal entity without shareholders or members and is generally established to reflect the wishes of the founder who may be an individual or corporate legal entity. Intuit can assist you to protect and preserve your wealth.

Advantages of Foundations:

- Reservation of powers
- Flexibility
- Migration
- Single or depreciating assets
- Beneficiary Information
- Orphaned Structure

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