

utmost™

UTMOST TECHNICAL EXPERTISE

At Utmost, we recognise that the lives and financial interests of today's high and ultra-high net worth clients often span multiple countries and jurisdictions. That's why we've built a Technical Services team with a truly international outlook, offering sophisticated and relevant support across our key markets.

UTMOST GROUP AND WHY THIS IS A USP

Our team of highly qualified professionals brings together deep expertise in tax, legal, financial planning and estate structuring from across the UK, Europe and internationally.

Whether you're advising a client with complex wealth planning needs or navigating changing regulatory landscapes, our global reach ensures you're supported with practical insight and timely solutions, wherever your clients are based.

Our technical experts are available to support advisers at every stage of the journey. Whether it's assessing initial suitability and structuring options, navigating jurisdiction-specific tax and regulatory considerations, or addressing cross-border planning and succession strategies, our team brings practical insight throughout. We aim to help you deliver solutions that remain robust and compliant as your clients' circumstances evolve over time and across borders.

KEY NUMBERS

OVER **400**
YEARS
OF COMBINED
**TECHNICAL
EXPERTISE**
AT YOUR DISPOSAL

OUR TECHNICAL TEAM
TOGETHER HOLD OVER

60 PROFESSIONAL
QUALIFICATIONS
INCLUDING
STEP, Chartered accountancy,
first and higher law degrees,
with many members being
qualified lawyers in their
respective jurisdiction of
expertise.

OVER **16** CORE
**JURISDICTIONS
COVERED**

Including the UK, France,
Italy, Portugal, Spain, Sweden,
Belgium, Luxembourg, the
Middle East, Latin America
and Asia. Each major market is
supported by legal expertise
with jurisdiction-specific
qualifications.

OUR MAIN TECHNICAL SERVICES



**Day to day
technical support**
for the adviser on
the tax and estate
planning needs of
your clients.



A broad range of
off-the-shelf trust
products designed
for **inheritance tax**
and **wealth transfer
planning**.



A dedicated **online
technical portal**
containing a broad
range of support
material.

NAVIGATOR

**Quarterly technical
briefing - Navigator.**
Navigator is a trusted
source for international
industry insights and
updated on insurance-
based wealth solutions.



A **European portability review
service** to ensure local tax
compliance for customers
relocating to European
jurisdictions.



Online and face to face training,
CPD and technical development
support to ensure you are kept up
to date with the **latest regulatory
and tax developments** impacting
your customers' current and
future planning.



Case Structuring and Deal
Structuring, including large case
management for high and ultra-
high net worth and cross border
planning, including bespoke
drafting and **product structuring to
address specific client needs**.



GET IN TOUCH WITH OUR EXPERTS
technical@utmostwealth.com

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

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