



Trust business  
experience since 1929



Connection  
Stability  
Security Structuring  
Strength  
Experience



# Our company profile

## **A boutique service provider**

Established in the British Virgin Islands since 1995, ATU offers wealth structuring and estate planning services as part of an international group, with headquarters in the Principality of Liechtenstein and offices in various major financial centres, including Switzerland. Unlike the traditional model of BVI corporate service providers, ATU focuses on value added services and tailor-made solutions. Dedicated services and personalized attention are the cornerstone of ATU's culture.

## **Competence and experience**

Our clients value us as a reliable partner, not only because we understand their expectations, but because we know how to exceed them. We achieve this objective by constantly investing in the growth of our multicultural and pluridisciplinary team. ATU strongly supports extensive training and qualification programs in fiduciary, banking, law, fund administration and accounting to constantly improve technical skills and to ensure compliance with the quality expectations of a discerning international clientele.

## **Swiss representation**

As we understand the critical importance of proximity, our Swiss Rep Office is here to help you develop, implement and maintain optimized solutions by facilitating the bridge between the sophisticated world of onshore financial services and the flexibility of offshore asset structuring platforms. The complimentary advisory services of our Zurich representation provide added value to you and your clients at no extra cost.

# Our services

## **Asset structuring and wealth planning**

We advise clients on the optimal structuring of their assets to help them protect and plan their estate, based on their needs as their life and business grow and change. There is not a “one-size fits all” approach. We strive to maintain a high level of accessibility so that clients’ personal needs and goals are addressed on an ongoing, proactive basis.

## **Trust, companies and fund set-up and administration**

ATU holds the most comprehensive trust license in the BVI, allowing the company to establish and administer all types of entities, including companies, partnerships, trusts, private trust companies and mutual funds.

Succession planning is a delicate transition that requires strategic direction and tactical implementation. Our services can range from simply holding assets in trust to avoid the delays, expense and publicity of probate procedures, or ensuring a smooth transmission of assets from one generation to another. Our objective is to provide for the long-term preservation of family wealth, including business assets across jurisdictions.

## **Fund solutions**

We have expertise across all BVI and Cayman investment fund structures involving a variety of different asset types. We offer the full suite of services to establish and administer investment funds all under one roof.

## **Support for financial services providers**

We work closely with family offices, trust companies, law firms, asset managers and other players in the financial services industry to ensure we fully understand their clients’ requirements and provide support services to help them implement and administer the most suitable wealth planning solutions for their clients. We also partner with them to provide the tailored back office support they need, where they need it.

## **Legal services**

With our integrated boutique law firm, we provide tailored advice on all aspects of British Virgin Islands company and trust law, private client, and business transactions.

## **Assistance with FATCA, CRS**

ATU can assist with the classification for FATCA and CRS purposes, facilitate the registration, establish policies and procedures, and assist with ongoing compliance requirements.

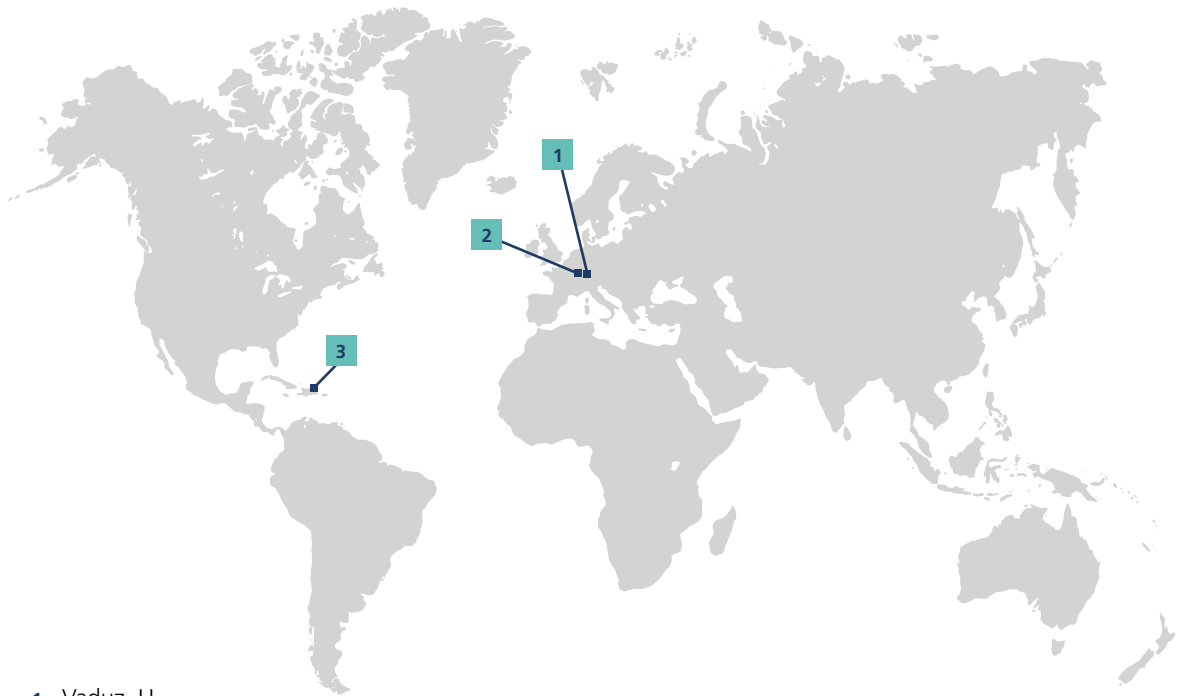
## **Economic Substance solutions**

The company also offers a comprehensive range of services for entities carrying on one or more activities captured by the Economic Substance legislation. ATU has a dedicated team that can offer legal advice and guidance in connection with all aspects of the economic substance regime as it continues to evolve, including consultation, implementation and operational services tailored specifically to fully meet economic substance requirements.

Guidance  
Clarity  
Quality Strategy  
Trust Vision



# International presence



- 1 Vaduz, LI
- 2 Zurich, CH
- 3 Tortola, BVI

ATU is part of an international group, with its headquarters located in Liechtenstein, a presence in Switzerland, and a well-established network of contacts in key financial centres.



*A reliable connection. Even in  
times of continuous change.*

## ATU Group locations

### **British Virgin Islands**

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### **Switzerland**

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### **Principality of Liechtenstein**

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