



Managed Trust Company

# World class fiduciary structuring for bank clients

As a bank, you're always looking to give your clients more. A Managed Trust Company through VG is a quick, low risk and cost efficient solution to elevate your private banking and ultra high net worth proposition with world class fiduciary structuring services.



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Private Wealth

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# What is a Managed Trust Company

Banks often want to offer trust, fiduciary and wealth-structuring services but may lack the technical or regulatory capability and infrastructure to run a full trust company internally.

A Managed Trust Company (MTC) partnership allows the bank to outsource this to a professional provider.

Partnering with VG, a leading and award winning trust company in Jersey, you can be confident your clients will receive the highest quality fiduciary and structuring services in a globally recognised and politically stable jurisdiction, whilst delivered from your bank's brand.

# Benefits to the bank

- Rapid entry into top-tier fiduciary services.
- Strengthened UHNW client relationships, increased client satisfaction and retention.
- Strategic offshore extension of brand.
- Best-in-class governance, compliance, and structuring.
- Scalable platform grows alongside the bank's ambitions.

## What's more

- VG can offer bespoke, non-standard products beneficial to the bank's clients for which the bank can obtain a commercial fee.
- VG can assist the Bank's relationship managers to develop client solution offerings.
- The Bank can grow the book of business within the MTC, collaborating with VG on new business opportunities.

# How it works

## Bank

- Brands the MTC.
- Appoints designated directors to the MTC board and retains input and oversight over client relationships.

## VG

- Provides the licensed platform, compliance systems and corporate governance.
- Provides Jersey-resident directors, MLRO, compliance officers and administrators and ensures full compliance with Jersey's regulatory standards.

- The MTC and its clients would be integrated into VG's systems and the MTC would adopt VG's policies, procedures, systems and processes.

## Together

- Clear service-level agreements define turnaround times and scope of duties.
- Joint oversight committee ensures quality, operational alignment, and continuous improvement.

# VG your expert MTC partner

VG's breadth and depth of experience in providing fiduciary services to clients dates back to the early 1980s and VG formed its first MTC in 2002.

We have a proven model of establishing Managed Trust Companies for financial institutions and deep experience serving families.

If you would like more in depth guidance or want to explore how a MTC could work for your bank, we'd be delighted to talk to you. Please contact us.



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