

Trust Essentials - July 2018

Newsletters - 24/07/2018

The relevance of public policy to judicial decisions affecting the Jersey finance industry

Our lead briefing this month is by new partner Oliver Passmore. Oliver currently sits on the steering committee for STEP's contentious trusts and estates special interest group.

He regularly draws on his expertise to produce commentaries for industry publications, including our lead briefing this month, which appears in *Trusts & Trustees*. Oliver's article explores how public policy arguments relating to the Jersey finance industry have been dealt with by the Jersey court.

Read it here: [The relevance of public policy to judicial decisions affecting the Jersey finance industry](#)

Regulatory impact of the Insurance Distribution Directive on the investment services industry

Directive 2016/97/EU on Insurance Distribution: a new regulatory trap for the asset management and private banking industry rendering services to clients based in the EEA? Eva-Gyori Torsel explores the issues in this briefing.

Read it here: [Regulatory impact of the Insurance Distribution Directive on the investment services industry](#)

Cayman HNWI Relocations Brochure

Ogier's Cayman team provides a comprehensive service to HNWIs looking to relocate to the jurisdiction. Our longstanding team draws on experience gained from operating in this market for

many years, with an unrivaled track record and network of contacts.

Read it here: [Cayman HNW Relocations Brochure](#)

Guernsey Court of Appeal provides an avenue of escape to tax advisors and trustees

The long awaited judgment of the Guernsey Court of Appeal in *M v St Annes Trustees* has now been handed down. On appeal, neither party challenged the decision of the Royal Court that Guernsey law should follow *Pitt v Holt*.

The Court of Appeal therefore proceeded on the assumption (but without expressly deciding) that Guernsey law was as *Pitt v Holt*.

Read it here: [Guernsey Court of Appeal provides an avenue of escape to tax advisors and trustees](#)

Current themes in private wealth structuring

At Ogier we continue to see Jersey trust companies winning substantive mandates for new private wealth structures. Plainly this bodes well for the future of the sector on the island. James Campbell's article considers the key drivers as to why ultra-high net worth families are choosing to structure now, and why these families and their advisers are choosing Jersey structures.

Read it here: [Current themes in private wealth structuring](#)

30 years on from the trusts boom of the 1980s, the role semi-contentious practitioners is growing

In this Q&A Advocate Gavin Ferguson and senior associate Alice Bricogne explain how changes in the industry since the trusts boom in the 1980s and early 1990s have led to the blurring of the lines between contentious and non-contentious practitioners.

Read it here: [30 years on from the trusts boom of the 1980s, the role of semi-contentious practitioners is growing](#)

About Ogier

Ogier is a professional services firm with the knowledge and expertise to handle the most demanding and complex transactions and provide expert, efficient and cost-effective services to all our clients. We regularly win awards for the quality of our client service, our work and our people.

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This client briefing has been prepared for clients and professional associates of Ogier. The information and expressions of opinion which it contains are not intended to be a comprehensive study or to provide legal advice and should not be treated as a substitute for specific advice concerning individual situations.

Regulatory information can be found under [Legal Notice](#)

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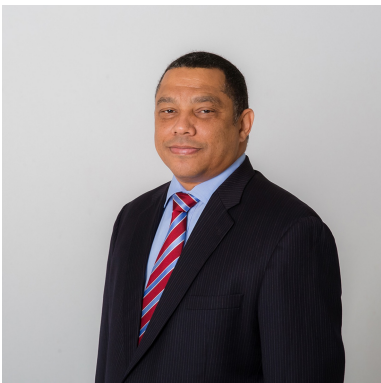
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