

Trust Essentials - October 2018

Newsletters - 09/10/2018

Trust Essentials - October 2018

Jersey's Royal Court provides guidance to trustees faced with requests for disclosure from a beneficiary

The Royal Court of Jersey, in the recently handed down judgment in *M v W Limited and Others*, has provided useful guidance for trustees in circumstances, outside the context of discovery in adversarial litigation, where a beneficiary of a trust is seeking disclosure of trust information.

The application was heard in October 2017 and was brought by one of the beneficiaries of a trust who was seeking delivery of a broad range of documents. In this briefing, senior partner Steve Meiklejohn and trainee solicitor Matthew Davies list the key points trustees should take away from *M v W Limited*.

Read the article here: [To see or not to see - Jersey's Royal Court provides guidance to trustees faced with requests for disclosure from a beneficiary](#)

Jersey's new Charities Law - first charity registers

Global Head of the Private Client and Trusts team James Campbell comments on the impact of the new charities regime and our at-a-glance guide tells you what you need to know.

Read the guide here: [At A Glance Guide to Jersey's new Charities Law](#)

Ogier sponsors STEP Guernsey lecture series

Ogier is sponsoring the 2018/19 STEP lecture series. Twenty lectures are lined up over the ten-month series, focussing on topical subjects including enforcement, family investment companies

and disclosure.

Read the news story here: [Ogier sponsors STEP lecture series 2018/19 in Guernsey](#)

The Luxembourg SPF: A private wealth management company of choice

Luxembourg partner Bertrand Geradin confirms the key features of the Luxembourg private wealth management company (known as SPF - société de gestion de patrimoine familial), a private wealth management vehicle which enables individuals to structure their estate in a simple, flexible, unregulated and tax-efficient manner and for numerous purposes, thereby appealing to various types of investors.

Read the article here: [The Luxembourg SPF: A private wealth management company of choice](#)

Privy Council upholds Court of Appeal ruling in long-running BVI trusts dispute

Ogier's Nicholas Brookes has been part of the team that successfully defended a high-profile and long-running BVI trusts dispute that was fought all the way to the Privy Council.

Read the news story here: [Privy Council upholds Court of Appeal ruling in long-running trusts dispute](#)

Cayman Islands wills for individuals with shareholdings in a Cayman Islands Company

Anthony Partridge and Fraser Allister comment on the process for a person who is not domiciled in the Cayman Islands to write a will dealing with his or her shareholding in a Cayman Islands company.

Read the article here: [Cayman Islands wills for individuals with shareholdings in a Cayman Islands Company](#)

Private Client and Trusts in Asia brochure

(simplified Chinese)

From simple to more sophisticated structures established for succession purposes, asset protection, tax efficiency, family governance or confidentiality, our team is focused on providing the right

advice for each client. Read more about our services to the Asian market in our brochure.

Read the brochure: [Private Client and Trusts in Asia](#)

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.

Disclaimer

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](#)

Meet the Author



[James Campbell](#)

Partner

[Jersey](#)

E: james.campbell@ogier.com

T: [+44 1534 514230](tel:+441534514230)

Key Contacts



Bertrand Gérardin

Partner

Luxembourg Legal Services

E: bertrand.geradin@ogier.com

T: [+352 2712 2029](tel:+35227122029)



Gavin Ferguson

Partner

Guernsey

E: gavin.ferguson@ogier.com

T: [+44 1481 752307](tel:+441481752307)



Anthony Partridge

Partner

Cayman Islands

E: anthony.partridge@ogier.com

T: +1 345 815 1810



Nicholas Burkill

Partner

British Virgin Islands

E: nicholas.burkill@ogier.com

T: +1 284 852 7372

Related Services

Dispute Resolution

Private Wealth

Legal

Related Sectors

Trusts Advisory Group