

**Family Office | Capital | Private Wealth
Advisory | Raising | Intelligence**

SGB-AMANA LIMITED was established by Dr Stuart Gibson and Gary Bellot to provide strategic advisory, capital and private wealth intelligence services to leading global family principals, single-family offices, multi-family offices, family businesses, UHNW entrepreneurs and sophisticated investors. SGB-AMANA is the catalyst between family offices and global private wealth professionals, including private banks, investment banks, private equity firms, venture capitalists, wealth managers, trustees, asset managers, insurance firms, legal firms and other professional advisers. Drawing on our unique private wealth intelligence system SGB-IQ, which is derived from our vast industry experience, extensive research and scientific analysis, we deliver value through independence, expertise and qualitative modelling - providing insight and strategic advice that drives better decision making for our clientele of leading family principals, family offices, UHNW entrepreneurs and sophisticated investors.

FAMILY OFFICE ADVISORY**Comprehensive Review, Audit and Profiling for Global Family Offices**

We conduct a thorough review, audit and evaluation of global wealthy family businesses and family offices and their existing private wealth professionals, aligning their performance with objectives. We delve deep into a family's values, purpose, legacy, next-generation aspirations and wealth preservation goals. This profiling helps us craft a tailored strategy for their future legacy and impact. We understand the unique challenges faced by principals of wealthy family businesses and family offices in selecting the right private wealth professionals matched to their requirements. We offer global wealthy family businesses and family offices with unparalleled insights and support. We evaluate service provider relationships and if our family office clients require superior solutions, we identify alternatives and guide them through a comprehensive rating and selection process, including negotiating favourable terms. We handle every aspect, including organising site visits, beauty parades and negotiating fees. We can also assist with the completion of the account opening forms as there are numerous to complete for most firms. Ongoing monitoring ensures that the chosen private wealth professional continues to meet our client expectations, and we identify potential concerns before they escalate. We empower global family offices to make informed decisions that shape their family legacy.

Family Charter - Heritage, Values, Ambitions, Culture, Purpose and Governance

We advise leading family principals, family offices, wealthy families and UHNW entrepreneurs on their family charter - using our own research, methodology and models; we audit and evaluate the family's heritage, values, ambitions, culture, purpose and governance. Through personalised consultations, we develop unique family charters, defining future commitments and aligning them with ESG strategies. We create a family charter for the family legacy and next generation.

Sustainability and Impact

We advise leading family principals, family offices, wealthy families and UHNW entrepreneurs on their sustainability and impact strategy - using our own research, methodology and models; we audit and evaluate the family's ESG/SDG goals and build impact that reflects the family vision, values and next generation legacy in line with the UN SDGs - providing insight and education for the next generation in

UHNW families. Our suite of services includes sustainability risk audits, vision and goal setting, strategy formulation, implementation, performance tracking, and reporting. We assist families in making impactful environmental commitments.

Philanthropy

We advise leading family principals, family offices, wealthy families and UHNW entrepreneurs on their philanthropic strategy - using our own primary research, methodology and models; we audit and evaluate the family's philanthropic causes and activities creating philanthropic strategies in line with their family vision, values and family charter.

Next Generation and Legacy

We advise leading family principals, family offices, wealthy families and UHNW entrepreneurs on their next generation strategy - engaging with the next generation; using our own research, methodology and models; we audit and evaluate the family vision, values and ambitions helping to build resilience and leadership in UHNW families. We offer comprehensive programmes in leadership, health and wellbeing, financial literacy, transition planning, and resilience building, preparing the next generation for effective family office leadership.

Risk Management

Our comprehensive risk assessment covers quantitative and qualitative analysis of your family office structure, institutional risks, fee analysis, investment portfolio overlap, and overall risk management.

Relocation

We help leading family principals, family offices and HNWs choose the best jurisdiction for their business and their families. For instance, we assist global HNW's and businesses move to the Channel Islands. In Jersey, we work with Locate Jersey, Government of Jersey, Jersey Business and Digital Jersey. In Guernsey, we work with Locate Guernsey, States of Guernsey, Digital Greenhouse Guernsey. We also work with other parties such as local estate agencies etc. and help to obtain the necessary licences, whether for residency or business.

Additional Family Office Advisory Services include:

Payroll, Bespoke Treasury, Cash Management, Bank Account Opening (globally), Private Jet Charter, Private Yacht Charter and Concierge Services.

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CAPITAL RAISING

Capital Raising

We help entrepreneurs and businesses with raising capital to enable their growth strategy.

Capital Deployment

We help family offices and UHNW entrepreneurs with the deployment of their capital.

Mergers and Acquisitions

We help strategic partners with their acquisition strategy or joint venture mergers and opportunities.

PRIVATE WEALTH INTELLIGENCE

At SGB-AMANAH **Intelligence**, we provide an independent rating system for global private wealth professionals, including private banks, trust companies, investment managers, insurance firms, private client lawyers, tax advisers, fintech firms, etc

Evaluation and Rating System of Global Private Wealth Professionals

- We evaluate, rate and objectively select global private wealth professionals (private banks, trust companies, investment managers, insurance firms, private client lawyers, tax advisers etc) to ensure the best match for our exclusive clientele, based on a number of factors:
 - Desk Research - we conduct extensive desk research on global private wealth firms and professionals.
 - Qualitative Research - we visit and conduct in-depth interviews in-person with global private wealth professionals.
 - Quantitative Research - we carefully review the answers to our extensive questionnaires in terms of numeric impact.
 - Due Diligence and Data Verification - we carry out deep due diligence and data verification processes on global private wealth professionals.
 - Scientific Analysis - we scientifically analyse the qualitative and quantitative data, together with our clients' requirements and an algorithm assigns a rating for each private wealth professional selected.
 - Human Psychology - finally, understanding private wealth business models, best practice and people, we use the vast experience and expert knowledge of our Selection Committee (built over 30 years working of working in the private wealth sector) we evaluate, rate and select the best match of global private wealth professional for our client.
- We have established our own extensive independent panel of approved global private wealth professionals.
- Utilising our own primary research, evaluation and rating methodology - **SGB-IQ**, we help family offices, family businesses and UHNW entrepreneurs (based on their unique criteria and requirements) select the most appropriate global private wealth professional.
- Our independent open architecture approach guarantees objective evaluation, rating and selection.

Contact Us

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