

AGREUS

Resourcing & Recruitment

FOR FAMILY OFFICES, TRUSTS AND CORPORATE SERVICES

UK | EMEA | USA | APAC



Agreus Group is a full-service resources and recruitment consultancy dedicated to working exclusively with Family Offices, Trusts and Corporate Services throughout the world.

We offer a bespoke and tailored service which unlike others isn't focused on specialism or industry but rather, tailored to each organisation.

As a result, we specialise in placing entry-level through to executive-level professionals within Investments, Legal, Finance and Operational roles.

Having operated within the Family Office space for over a decade, Agreus Group was contacted by a client asking for support on their journey to becoming a leading Global Trust and Corporate Services organisation.

We soon realised the value we could add to Family Offices by working closely within the Trust and Corporate Services industry, and have been working with them ever since.

UK | EMEA | USA | APAC





“

I support domestic and international organisations with establishing local business, expanding overseas and finding the right talent to support their growth. This includes a complete range of tailored recruitment services created exclusively for Trust, Corporate Services and Fund Administration Companies. Recent placements have been made to support organisations with;

- Legalisation of documents and other corporate and commercial legal and compliance services
- Fund administration support for alternative investments
- Safeguarding and managing personal and family wealth.

Since founding more than a decade ago, Agreus Group has become an established presence across the UK, EMEA, APAC and USA. Please read through our digital brochure to find out more about the work we do in each corner of the world.

CHRISTOPHER COSTI

Senior Advisor

Agreus Group

Private Wealth & Family Office Recruitment

Clients want to feel confident that their commercial, alternative and luxury assets, are protected, safeguarding the investments now and for the next family generation. At Agreus Group, we not only support you in finding the right people to achieve this but we regularly produce insights on a range of topics including wealth generation, intergenerational leadership and portfolio diversification to allow you to also best advise your clients with relevant and insightful information.

Specialisms include:

- Private Wealth, Family Office Professionals
- Trust Relationship Management
- Administration



Finance, Accounting & Administration Recruitment

Companies will take care of a client's financial records, providing asset accounting for anything from private equity and real estate funds to trusts and foundations. They also offer accounting services across a range of entities, including bookkeeping and SPV management. They can handle all matters involving payments and payroll, both locally and overseas. And they can run the administration of securities and assets, agencies and trustees.

Specialisms include:

- Financial Records – Property, Fund and Trust & Foundation Accounting
- Management Accounting
- Bookkeeping



Governance, Risk & Compliance Recruitment

The world is full of constant opportunity. But success means staying aligned with rigorous compliance standards and an increasingly complex web of regulation which can feel insurmountable. Establishment, Statutory Compliance and Regulatory Compliance recruitment is vital for any business.

Specialisms include:

- Statutory Compliance (Accounts, Registers, Taxation)
- Establishment (Set-up & Support)
- Regulatory Compliance (Onboarding & Verification, Oversight, Support)



Funds & Institutional Recruitment

At Agreus Group, we treat financial skills and qualifications as a given and instead focus on the competency and experience of each candidate. The modern fund administration services provider needs to be more than an accountant and need to now be able to provide multi-jurisdictional compliance and reporting services, as well as the technology and expertise to handle multiple asset classes, complex fund structures and investor reporting demands. We will only present a high-calibre of candidate who is capable of delivering all of the above and more.

Specialisms include:

- Funds
- Accounting
- Finance
- Administration



Advisory & Transaction Support Recruitment

Companies offer advisory support in legal matters, from employment law to board affairs. They provide advisory support in tax, whether that's regarding the complexities of modern supply chains or understanding the tax implications of the specific countries in which their client is looking to operate. They also offer advisory support in all employment-related matters, as well as in the structuring, enhancing and preservation of wealth.

Specialisms include:

- Legal (Commercial & Regulatory, Employment, Corporate & Boards)
- Wealth (Family Business, Wealth Succession, Family Governance & Philanthropy)
- Corporate & Indirect Tax

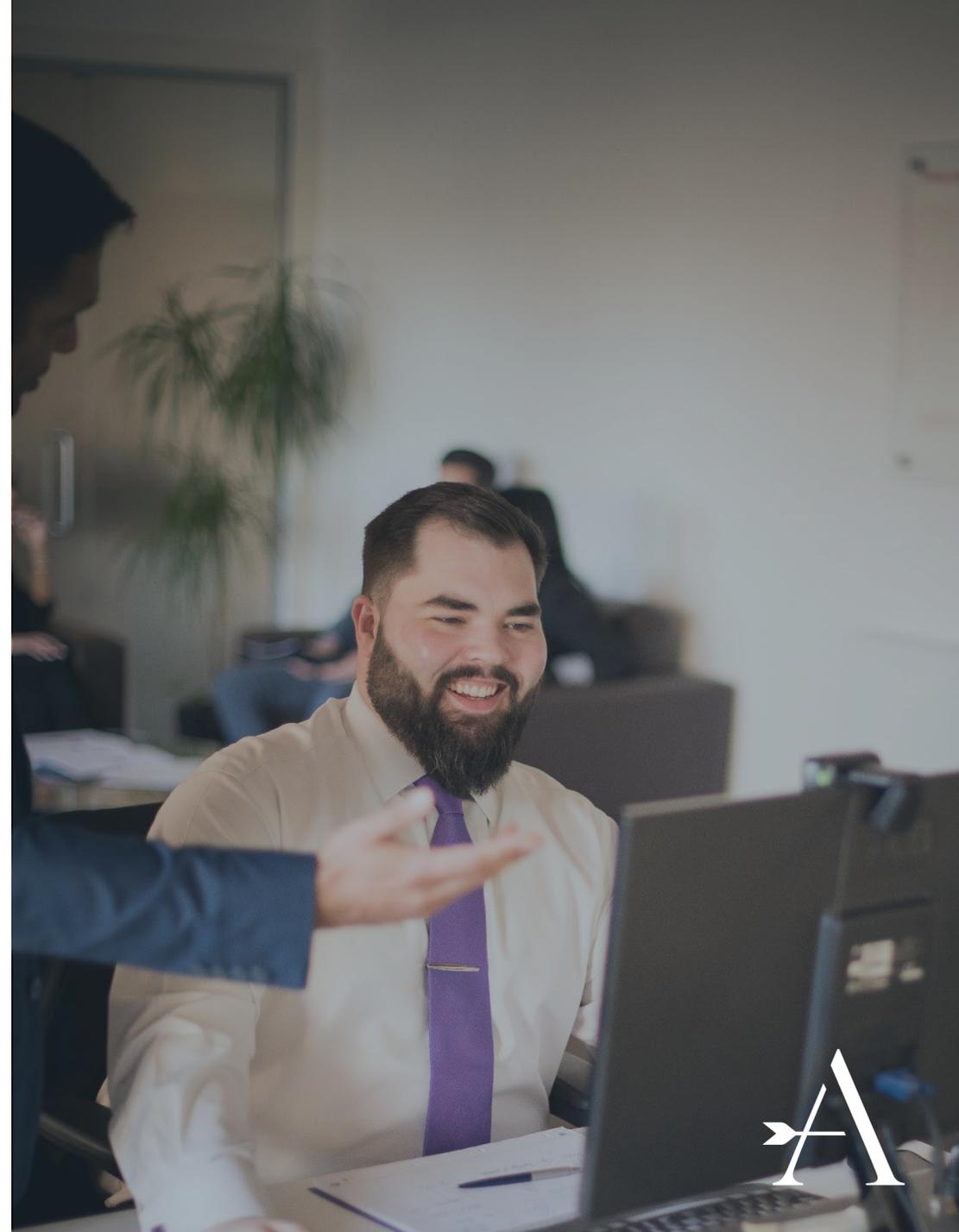


Corporate & Indirect Tax Recruitment

Companies provide; company formation and implementation services; regulatory and tax compliance; financial accounting and reporting, and outsourced business solutions. Areas of expertise include; real estate; aircraft leasing; structured finance and securitisation; corporate trust and escrow services, and international expansion.

Specialisms include:

- Company Formation/
Administration
- Tax Advisory
- Transfer Pricing

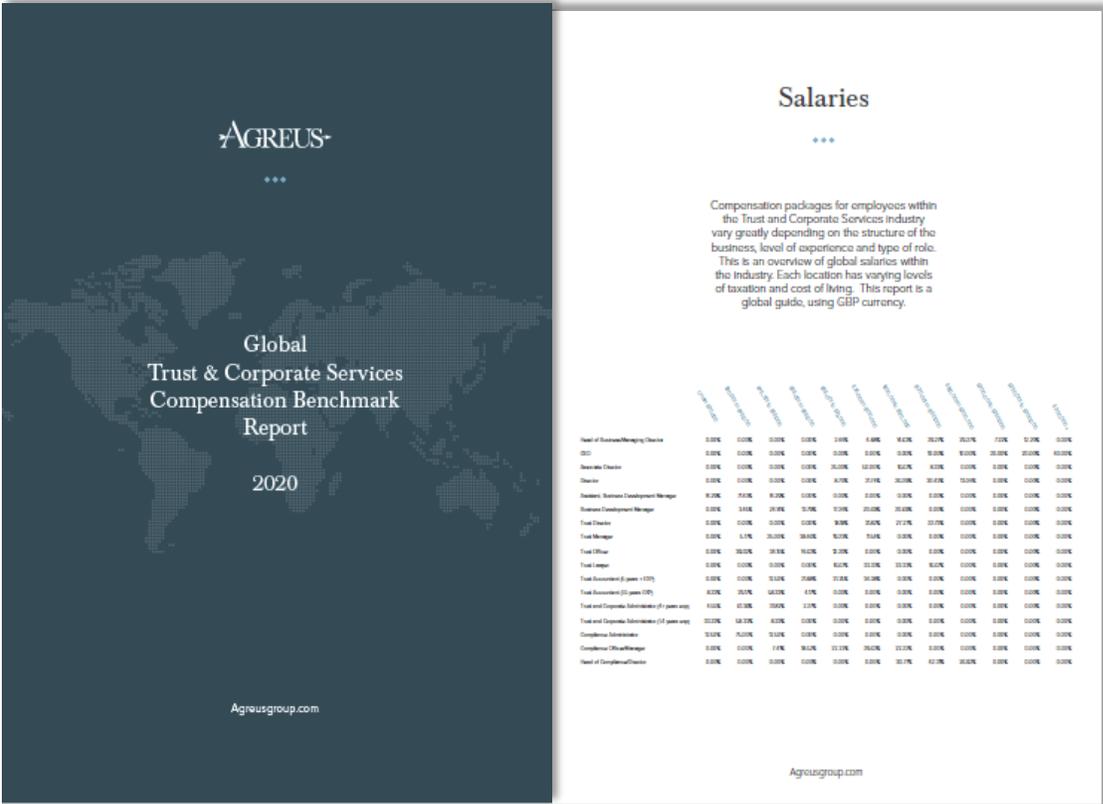


Learn more about remuneration packages with our

Global Trust & Corporate Services Compensation Benchmark Report

Get in touch to receive a copy of our report to learn more about compensation packages for employees within the Trust and Corporate Services industry. Over 100 people surveyed from over 50 companies.

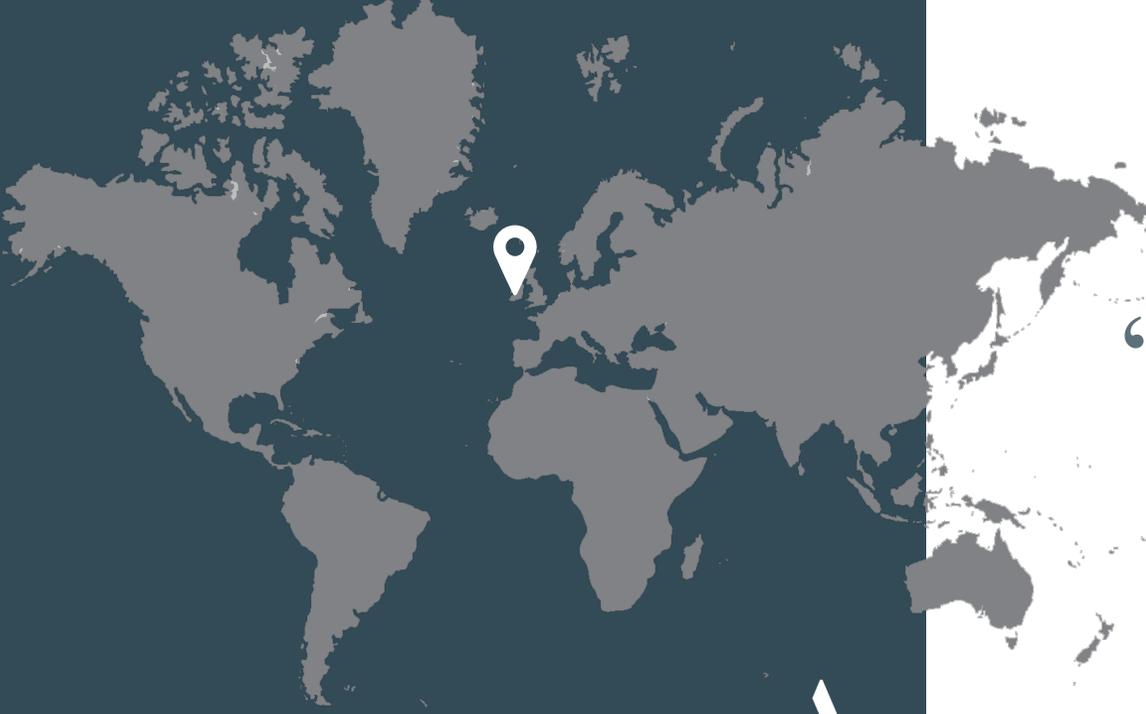
- Benchmark pay for employees in the most common roles.
- Find out which types of bonuses are most common in within the industry.
- Review bonuses as a percentage of salary.
- Understand which roles are likely to be incentivised with a formulaic bonus.
- See a list of various methods used for calculating formulaic bonuses.
- Compare the most common employee benefits.



UK & CHANNEL ISLANDS

Recent locations include

London, Bristol, Jersey, Guernsey and Isle of Man.



“ Christopher helped me greatly while looking for a new job. He has a very professional approach, is a very good listener and has always been there for me if I needed clarifications or reassurance during the process. The close, long term relationships he holds within Trust, Corporate Services and Family Offices firms, make him an extremely valuable point of contact if looking in these sectors. Over the time we’ve been in touch, he has always presented me opportunities of great interest and relevance. I would highly recommend him!

LUISA SPEDALIERE
Vistra Group
London

“ Chris has a positive and professional attitude and approach which is extremely helpful. He is quite happy to accommodate your ideas and add his own where appropriate which can be very helpful in negotiations. Critically he keeps you in the loop at all times. Good to have him in your corner.

CHARLES O’SULLIVAN
STM Group
Channel Islands

AMERICAS

Recent locations include

Brazil, BVI, Canada, Cayman Islands,
Curacao, United States.



“ Chris is easy to talk to, he listens to what you are saying and will fit the person to the job. I went for something completely out my comfort zone but he reassured me my personality would match the company. He was easy to contact, always returned calls and provided prompt feedback after interviews. There was no pressure and overall just a pleasant experience. I have now moved to a new role, I am out of my comfort zone (not always a bad thing) but I do (so they have told me) fit in well.

ANGELA SAMPSON

Ravenscroft

“ Of all the Recruitment Agents I have worked with, Chris was by far the most honest, diligent and helpful and regularly went above and beyond what was asked of him. I would recommend him to anyone looking for work within the fiduciary industry.

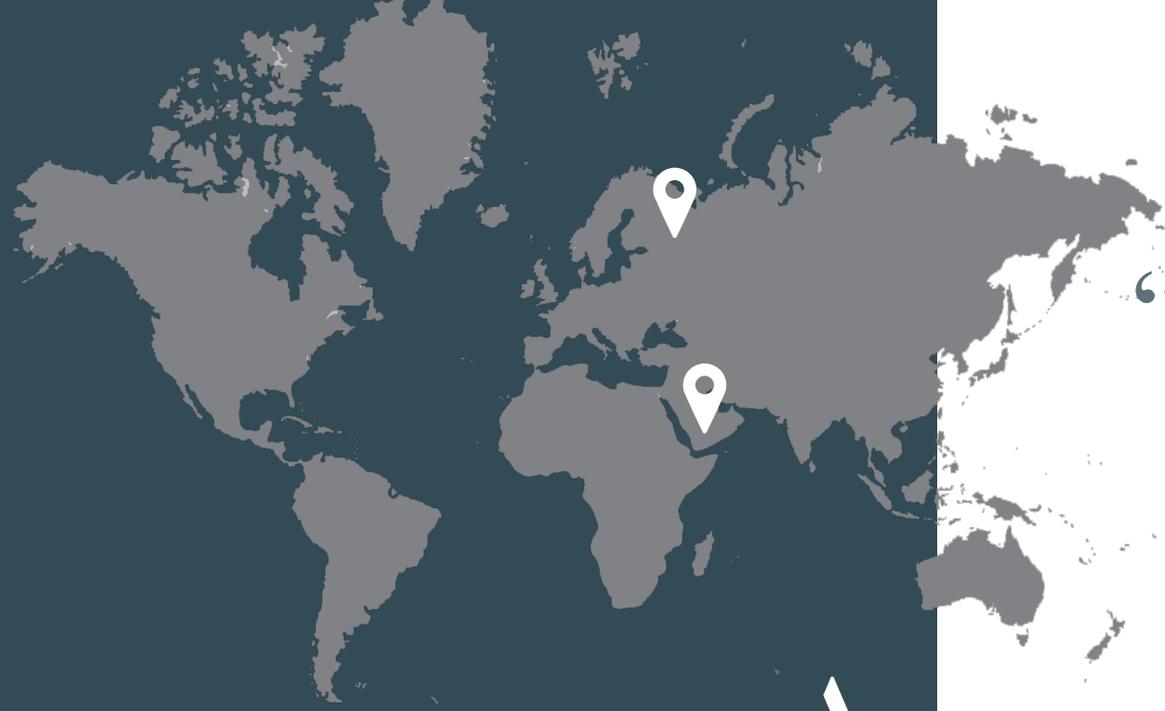
RORY VAN LUEVEN

Wilton Group

EUROPE, MIDDLE EAST AND AFRICA

Recent locations include

Belgium, Bulgaria, Cyprus, Czech Republic, Germany, Hungary, Ireland, Italy, Luxembourg, Malta, Mauritius, Netherlands, Poland, Romania, Slovakia, Spain, Sweden, Monaco, UAE.



“ *It was a pleasure to be assisted by Chris whilst looking for a new position after relocating to Malta. Chris is very professional and his communication skills are excellent, in terms of keeping one up to date on progress and assisting with finding the right position. Thanks to Chris and his continued efforts, I was quickly able to find work in Malta. I would highly recommend Chris, very impressed with the friendly and dedicated service he provided.*

EMILY BURGESS

Bentley Reid
Malta

“ *Chris is a professional Senior Advisor combining efficiency and attention to detail. He takes the time to listen to what the client is looking for and providing suitable options. He is quick to follow up and always provides feedback when he says he will. He not only achieves excellent results, he comes across as friendly and genuinely interested in the people he meets and deals with. Having worked with Chris, I have no hesitation in recommending him as a valuable and professional recruitment advisor.*

JULIAN UZZELL

Maitland Group
Mauritius

ASIA-PACIFIC

Recent locations include

Australia, China, Hong Kong SAR, India, Indonesia, Japan, Macau SAR, Malaysia, Seychelles, Singapore, Taiwan.

“ I have dealt with a number of recruitment advisors and head-hunters, but Christopher has been the most pro-active and helpful, setting up interviews, helping me expand my network and providing advice that has been invaluable in my search for a senior management position in Asia or Europe. I would definitely recommend him to both job seekers and recruiters.

EDWARD GUMBLEY

Trident Trust
Hong Kong



Advisory Board

Agreus has carefully assembled an Advisory Board of four experts – giving our clients direct access to individuals with years of hands-on experience and a wealth of wisdom.



IAN BUCHANAN
Chief Investment Officer
Misland Capital



DAVID RUDGE
Managing Director
Trust & Fiduciary



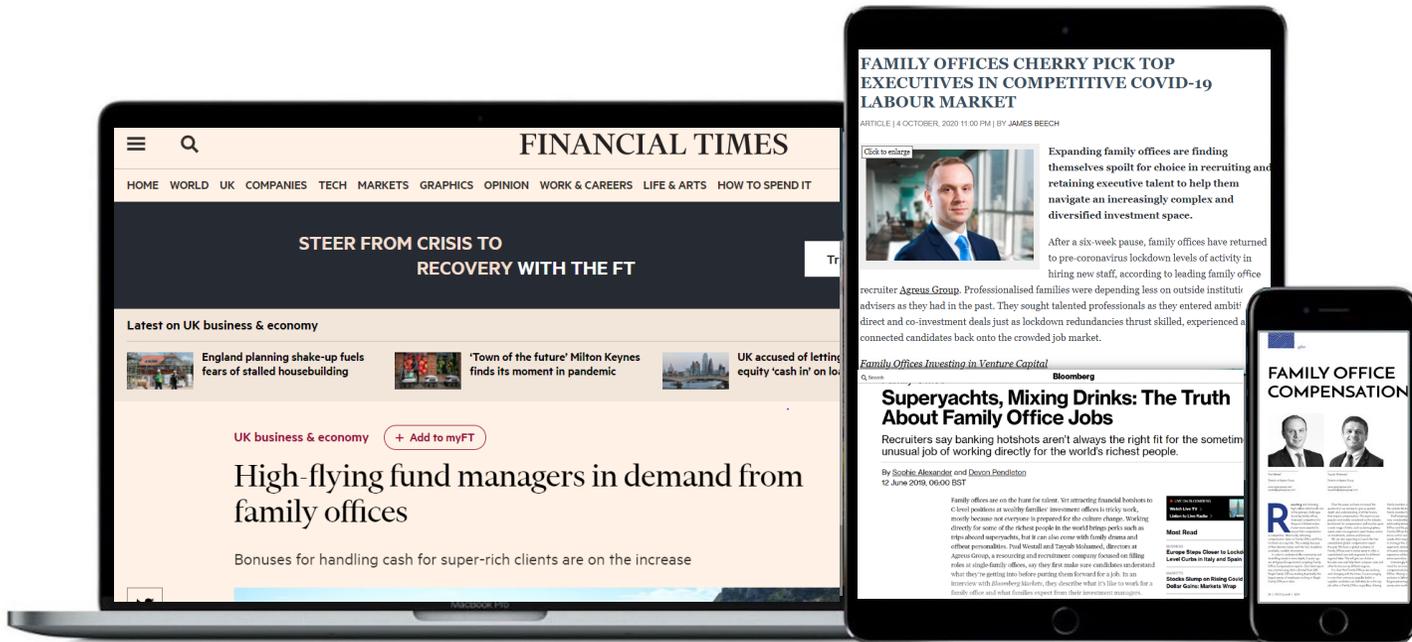
STEPHEN ROSS
Partner
Withers, Law Firm



GREGOIRE IMFELD
Head of Family Office
Pictet, Private Bank

Insights and Research

We pride ourselves on adding value to our network and believe the best way to do this is by providing insights, opinion and thought-leadership on a host of pain points and issues relevant to the Family Office, Trust and Corporate Services environment. Our insights can range from Global Compensation Benchmark Reports to roundtable events and white papers. We have also created a Thought-Leadership Council with 30 of the world's most influential leaders and voices.





AGREUS
A FOCUS ON INTERGENERATIONAL LEADERSHIP IN FAMILY OFFICES

« The next generation make a beautiful big picture, formed of their parent's values their diverse skill-set and then their own ambitions which differ from the generation before them and includes the likes of impact investing and philanthropy. They are bigger-picture people, they think globally, they care about connectivity, networking and utilising a global network of acquaintances.

Diga Vissara

CONTENTS

- 1 Introduction
- 2 The Founder
- 3 The CEO
- 4 The Suits
- 5 The Philanthropist
- 6 The Next-Gen
- 7 The Mentor
- 8 Conclusion



AGREUS

A FOCUS ON THE NEXT-GENERATION

We distributed a survey to the Global Next-Gen Community to find out their views on existing leaders and succession. These are the results.

84% of members believe that the most common reason for their parents' or grandparents' success was their own effort rather than their family's connections.

73% are more likely to choose a professional advisor than a family member for their succession plan.

90% believe they have the ability to compete for top family office roles.

67% believe they are ready to take on responsibility of the Family Office.

Identify the most common reason for their parents' or grandparents' success was their own effort rather than their family's connections.

Identify the most common reason for their parents' or grandparents' success was their own effort rather than their family's connections.

Identify the most common reason for their parents' or grandparents' success was their own effort rather than their family's connections.

It is exciting for the Family Office, one of the most influential organisations in the world, to be able to provide the next generation with the tools and resources they need to succeed. This has been a long process, but one that is now well underway. The next generation is being prepared for the challenges ahead, and the Family Office is playing a key role in this process. The next generation is being prepared for the challenges ahead, and the Family Office is playing a key role in this process. The next generation is being prepared for the challenges ahead, and the Family Office is playing a key role in this process.

Outside of the Family Office, the next generation has a lot to learn from the experiences of their parents, their grandparents, and their mentors. The next generation has a lot to learn from the experiences of their parents, their grandparents, and their mentors. The next generation has a lot to learn from the experiences of their parents, their grandparents, and their mentors.



AGREUS

THE FOUNDER

Steven M. Smith is the Founder of High Family Office and Founder of A.G. Smith & Associates, an international executive search firm. He also manages and oversees the High Family Office which was created when Steven Smith founded the firm in 1984 as a "retired" leader in the family office. Steven M. Smith is the Founder of High Family Office and Founder of A.G. Smith & Associates, an international executive search firm. He also manages and oversees the High Family Office which was created when Steven Smith founded the firm in 1984 as a "retired" leader in the family office.

Superyachts, Mixing Drinks: The Truth About Family Office Jobs

Recruiters say banking hotshots aren't always the right fit for the sometimes unusual job of working directly for the world's richest people.

By Sophie Alexander and Debra Penland
12 June 2019, 06:00 BST

FAMILY OFFICE COMPENSATION

Recruiters say banking hotshots aren't always the right fit for the sometimes unusual job of working directly for the world's richest people.



AGREUS

Resourcing & Recruitment

FOR FAMILY OFFICES, TRUSTS AND CORPORATE SERVICES

UK | EMEA | USA | APAC

