



Bank of East Asia (Trustees) Limited ("BEA Trustees") offers a comprehensive range of trustee services for both individual and corporate clients, including professional trust and fiduciary services. We act as trustee for private family trusts, charity foundations, investment funds, pension funds, provident funds (MPF and ORSO schemes), and employee share award schemes, as executor of wills or administrator of estates for deceased clients, and also as escrow agent for commercial transactions in Hong Kong and overseas.

BEA Trustees was established as a trust company in Hong Kong in 1975 and has been qualified as an approved trustee by the Mandatory Provident Fund Schemes Authority (MPFA) since 1999. We are a wholly owned subsidiary of The Bank of East Asia, Limited (BEA).

Services for Individual Clients

At BEA Trustees, we have decades of experience in providing tailored financial solutions designed to assist our high-net-worth clients in achieving their financial, estate, and succession planning objectives and preserving their family wealth for generations to come.

Private Family Trusts

We help many customers to protect their wealth by establishing and administering private trusts. Trusts can be established for a number of purposes, including estate and succession planning, asset protection and strategic wealth planning, family business continuation, and charitable purposes. We also establish standby trusts which ensure that a customer's assets or insurance plans are managed in the event that the customer becomes incapacitated.

Private Investment Companies

We also help to form and administer private investment companies, allowing customers to consolidate their assets in a flexible and confidential manner while generally limiting their liability for such assets to that of a corporate entity.

Will Execution and Estate Administration in Hong Kong and Overseas

As the executor of a will, we ensure that the wishes of its testator are carried out effectively. Where there are ongoing trusts established by the will or children who are not of full age, we will continue to act as trustee until all assets have been properly administered. Meanwhile, in case of intestacy, we can be appointed as administrator of an estate, simplifying and expediting the formalities in issuing a letter of administration and avoiding the expense of an administration bond.

Services for Corporate Clients

As well as our services for individual customers, BEA Trustees also provides a number of corporate services. These include establishing unit trust investment funds in Hong Kong and overseas and managing their accounting, calculating NAV, administering funds, and providing registrar services for a number of SFC-authorised investment funds, private equity funds, ORSO schemes, pension funds, maintenance funds, and employee share award schemes. We also provide tailored escrow agent services for acquisitions, mergers, sale and purchase agreements, private placements, and debt securities issues.

For further information about BEA Trustees' range of services, please contact us directly:

Tel: +852 3608 0696 | Email: trustmarketing@hkbea.com

www.hkbea.com

Disclaimer

The information provided above is only for reference and does not represent any legal or taxation advice from The Bank of East Asia, Limited or any of its subsidiaries. Further professional tax and legal advice should be sought before engaging any of the services mentioned above. Not all services mentioned above may be available in all jurisdictions.



BEA 東亞銀行

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信託服務





東亞銀行(信託)有限公司(「東亞信託」)能為個人及企業客戶提供一站式的專業信託及資產託管服務。東亞信託為私人家庭信託、慈善基金、投資基金、退休基金、公積金(強積金及職業退休金計劃)及僱員股份獎勵計劃擔任受託人。我們亦為已故客戶擔任香港及海外遺囑執行人或遺產管理人,以及擔任香港及海外商業活動的託管代理人。

東亞信託於1975年成立,為香港註冊的信託公司,並自1999年起成為香港強制性公積金計劃管理局(「積金局」)核准受託人。東亞信託乃東亞銀行有限公司(「東亞銀行」)之全資附屬機構。

個人客戶服務

東亞信託擁有數十年經驗,為高淨值客戶量身定制財富規劃方案,助其完成財務、遺產及繼承策劃等目標,使家庭財富世代相承。

私人家庭信託

我們協助客戶們建立及管理私人信託,使其財產得到保障。成立信託可達到多個目的,包括遺產及繼承策劃、財富保護及策略性財富計劃、家族生意延續及慈善捐款安排。我們亦可協助客戶成立備用信託,以確保當客戶不能自理時,其資產或保險金,均得到適當管理。

私人投資公司

我們可協助客戶成立及管理私人投資公司,讓客戶於靈活及保密的情況下整合其資產,從而在一般情況下限制客戶就該資產的個人責任至公司層面。

香港及海外遺囑執行及遺產管理

作為遺囑執行人,我們可確保立遺囑者之意願能夠有效地執行。如遺囑涉及成立信託或未成年之子女,我們會繼續擔任受託人,直至所有財產得到恰當分配及處理。同時,在去世者無遺囑的情況下,我們可被委任為遺產管理人,簡化及加快遺產管理書簽發程序及避免繳付管理保證金之不便。

企業客戶服務

除個人客戶服務外,東亞信託也同時提供一系列企業服務,包括成立香港及海外單位信託投資基金、提供單位信託基金會計及淨資產價值計算、基金管理、各種證監會核准投資基金的註冊服務、私人股本基金、職業退休金計劃、退休基金、維修基金及僱員股份獎勵計劃。我們亦為收購、合併、買賣協議、私人配售、債務證券發行等提供度身的託管代理人服務。

如欲獲取更多有關東亞信託的服務詳情,請直接聯絡我們:

電話: +852 3608 0696

電郵: trustmarketing@hkbea.com

www.hkbea.com

免責聲明

以上資料只作參考用途,並不代表由東亞銀行有限公司或其附屬機構所作出的任何法律或稅務建議。使用上述任何服務前,請諮詢專業法律及稅務建議。並非所有司法管轄區都提供上述所有服務。



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