

# Case Study

Wills | Trusts | Tax and Accounting  
Management



*Allan's family have been clients of Perpetual Guardian since 1933, when his grandfather Albert began a relationship with us. Allan's father Thomas inherited two commercial properties from Albert in his Will, which was drafted and administered by Perpetual Guardian.*

*Thomas in turn passed the properties onto Allan when he passed away.*

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speak to us today.**

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Under the guidance of Perpetual Guardian, Allan established the 'AGS Trust 2008' to hold two commercial properties, his investment holdings and his family home. The Trust provided the means to manage wealth for his family and future generations, and to ensure care for a disabled daughter, unable to look after her own affairs.

Perpetual Guardian provided the assurance that the Trust was lawfully compliant and would stand the test of time. Further, Perpetual Guardian sees to all the administration for the Trust and our Investment Advisory team constantly reviews the portfolio of investments, to balance risk and both income and capital growth.

We also provide advice on optimal asset structuring and future distributions from the estate. Allan receives specialist tax and legal advice from Perpetual Guardian and we complete tax returns for both the Trust and Allan.

## **We offer real depth of expertise**

We believe a great team is Perpetual Guardian's most valuable asset. Our people are passionate about what they do, how they do it and care about the well-being of those who have entrusted them with the safe guarding of their assets. Perpetual Guardian employs highly trained and qualified staff. They are experts in providing well-crafted Trusts, Wills and Enduring Powers of Attorneys to ensure that your assets are protected in the way that you want.

Our team can be found throughout our wide network of offices across New Zealand and are available to work directly with you. It also means our experts will be there locally when you need them. The advisers are supported nationally by the strength and depth of a trustee company which has been serving New Zealanders for over 130 years.