



UDO UDOMA &
BELO-OSAGIE

Private Wealth

PRACTICE GROUP



www.uubo.org

**For more
than
40 years,**

Udo Udoma & Belo-Osagie ("UUBO") has advised high-net-worth individuals ("HNIs") and corporates on various aspects of private wealth, succession planning and the management of family-owned businesses.

As a leading Nigerian full-service law firm, we have seen the need to set up our Private Wealth practice as a distinct practice group and a strategic addition to our comprehensive suite of legal services. We recognise the growing significance of private wealth management in structuring and preserving wealth across generations, and the need to provide specialist support to HNIs, families, family-owned businesses and family offices in Nigeria.



What is the Private Wealth Practice?

Private wealth management is a critical focus area for individuals, families, family-owned businesses and family offices specialising in the planning and executing seamless wealth and asset transition from one generation to the next, being an essential element for the continued success and longevity of generational wealth.

The practice encompasses a broad spectrum of services, including succession planning, investment advisory and structuring, risk assessment, tax structuring and optimisation, estate and wealth/assets administration, trustee and fiduciary services, family office and governance advisory, business establishment, nominee and escrow agent services, and other support services for ensuring the long-term financial sustainability of individuals and families.



Tailored Service Offerings



Estate and Trust Planning

Designing tailored transition management strategies and implementing optimal structures for wealth protection. Our services include Will drafting, trust formation, creating special purpose vehicles ("SPVs") for succession planning, and estate tax structuring and optimisation.



Wealth Transfer and Succession Planning

Offering strategic guidance on managing, preserving, and transferring wealth, leveraging tailored investment and wealth transfer structures to ensure long-term sustainability and seamless succession planning.



Tax Structuring and Optimisation

Through our tax team at UUBO, providing strategic advice on structuring assets and implementing tax-efficient approaches to minimise tax exposure while maximising income generation and enhancing asset protection.



Asset Protection and Structuring

Advising on and facilitating the establishment of asset protection structures, including trusts, SPVs, and other entities, to safeguard private wealth. It also includes providing expert guidance and assistance in establishing asset protection structures, including trusts, special purpose vehicles (SPVs), and other entities, to ensure the secure preservation of private wealth.



Trustee and Fiduciary Services

Advising on the establishment of trust structures and assisting with the implementation of the structures, acting as trustees, advisors, and fiduciaries and providing governance oversight for trusts, estates, foundations, and other wealth management vehicles.





Family Office and Governance Advisory

Acting as trusted advisors to family offices and providing legal guidance required for deal structuring, transaction documentation, negotiation and deal implementation.



General Legal Advisory

Providing tailored general legal advisory services, offering support in the amicable resolution of conflicts, family disagreements, and business disputes with sensitivity. Additionally, we will provide ongoing advice on the administration of estates and properties, including acquisition, perfection and sale, while ensuring personalised attention to meet the unique needs of each individual or family.



Custodial and Company Secretarial Services

Through our company secretarial arm, Alsec Nominees Limited, keeping records and storing critical documents for our clients while ensuring the strictest level of confidentiality and document security. In addition, we are able to provide full company secretarial support to client's corporate entities and trusts, including maintaining statutory registers, preparing and filing corporate returns with the Corporate Affairs Commission, attending and taking minutes of board and shareholder meetings, advising on corporate governance and compliance matters, and supporting the company with board resolutions, share transfers, and other routine corporate actions in line with applicable Nigerian laws and regulations. structures, including trusts, special purpose vehicles (SPVs), and other entities, to ensure the secure preservation of private wealth.



Why is it Important?



Ensures financial sustainability and seamless generational wealth transfer.



Helps individuals and families navigate the complexities of wealth preservation and transfer.



Minimises risks and maximises wealth preservation.



Optimisation of assets for higher returns and tax efficiency



Provides a centralised structure for managing diverse assets, ensuring efficiency and strategic decision-making.



Provides insight and guidance on alternative investment structures for sustaining long-term financial security.



Ensure that wealth management and planning is in compliance with relevant laws.

Why Choose UUBO?



Expertise and Reputation

1

We are an established firm with top-tier local and global rankings, deep expertise across 21+ practice areas, and a full suite of legal, tax, regulatory, and advisory proficiencies in one firm.



Client-centric Tailored Legal Solutions

2

We provide personalised support tailored towards wealth preservation, asset protection and financial growth.



Integrity & Trust

3

We have a strong reputation for Integrity, professionalism, confidentiality, and excellence in the legal industry.



International Best Practices

4

Affiliation with networks of global law firms to handle cross-border wealth management needs while addressing local market needs.



Technology

5

We leverage cutting-edge technology, including proprietary in-house solutions, seamlessly integrated into our client services. Our systems adhere to the highest security standards, ensuring robust data protection and confidentiality.



Key Contacts

Want to know more? Please reach out to us at privatewealth@uubo.org to schedule a chat. Our team would be delighted to assist you.

Private Wealth Advisory



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