COLLAS CRILL

The future of wealth management

APRIL 2025

Director Greta Pender features in issue 423 (April 2025) of Business Brief.

The edition is focused on *'opportunities and threats: the future of wealth management'* and Greta shares her key insights from February's STEP Global Congress 2025.

The event took place in Rome and brought together international trust and estate professionals to explore the evolving landscape of wealth management and highlight the global trends that are shaping the future of private wealth.

Greta said: *'From a study of +2,000 students from global business families, it was noted that only 4% intended to start working in the family business and continue there permanently. In contrast 88% had no intention of succeeding to the leadership of the family business, and in fact wanted to set up their own business, often in a different sector. These figures illustrated the importance of having open discussions with the generations across the family and implementing succession strategies for the family business, especially if this is to be externalised outside of the family.'*

Click here to read the full edition - Greta's article is one pages eight and nine.


The future of wealth management

GRETA PENDER, CHAIR OF THE GUERNSEY BRANCH OF THE SOCIETY OF TRUST AND ESTATE PRACTITIONERS AND A DIRECTOR AT COLLAS CRILL TRUST, SHARES KEY INSIGHTS FROM STEP GLOBAL CONGRESS 2025

ADVISING YOUNG WEALTH CREATORS: BUILDING NEXT-GEN LEGACIES

'BE CURIOUS AND SHOW A REAL INTEREST IN YOUR CLIENT, THEIR FAMILY, AND THE BUSINESS ENDEAVOURS CONDUCTED TO GENERATE THEIR WEALTH'


PURPOSE AND RESPONSIBLE STEWARDSHIP OF WEALTH

TACKLING ECONOMIC CRIME – WHAT NEXT AND WHERE SHOULD RESPONSIBILITY LIE?

'REFERENCE WAS MADE TO THE INTERNATIONAL FINANCE CENTRES, ONCE NEGATIVELY LABELLED AS 'OFFSHORE TAX HAVENS', AS ACTUALLY BEING BETTER REGULATED THAN SOME ONSHORE CENTRES'

MENTAL CAPACITY AND PROTECTION OF VULNERABLE CLIENTS

COLLAS CRILL An independent provider of trust and corporate solutions

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