

THE PREMIER CHOICE FOR WEALTH PRESERVATION.  
**BERMUDA.**



BUSINESS DEVELOPMENT AGENCY  
**BERMUDA**

# The Gem of the Atlantic

Bermuda is the premier choice for wealth preservation, making it an ideal destination for high-net-worth individuals seeking to protect and grow their wealth.

With sophisticated corporate and financial products, as well as professional services, Bermuda creates an ideal atmosphere for global transactions. The island offers a diverse range of corporate structures to meet the specific needs of family offices.

Through its residency programmes, Bermuda aims to become the destination of choice for families seeking stability, safety, favourable tax treatment, privacy, and all the advantages of living in beautiful Bermuda.

Discover the allure of Bermuda, where breathtaking natural beauty meets world-class business opportunities. Our leading corporate and financial services, coupled with a business-friendly environment, make the island an ideal destination for international enterprises.





# Why choose Bermuda?

## EXPERTISE

Bermuda's international business sector is a leader in serving high-net-worth individuals and family offices, offering tailored wealth management services, including private banking, trust planning, and investment management. Bermuda's stable environment and favourable tax regime make it an attractive jurisdiction for preserving and growing significant wealth.

## PROXIMITY

Located in the heart of the Atlantic Ocean, Bermuda offers daily flights to the United States (with US customs and immigration pre-clearance), Canada, and the United Kingdom, providing seamless access to gateway cities, key investors, and capital markets.

## CLARITY

Robust and respected regulatory frameworks make Bermuda increasingly attractive to the financial services industry. Bermuda's body of law is rooted in English common law and is regularly updated to keep pace with the ever evolving global landscape.

## TRUST

Bermuda boasts over 100 years as a leading trust jurisdiction providing fiduciary services to private clients with 26 licensed trust businesses and 180 members of the Society of Trust and Estate Practitioners (STEP).

## RESILIENCE

Bermuda offers regulatory security, political stability and a resilient, modern framework. The island's ability to withstand challenges and adapt to changing economic conditions has provided a stable and secure environment for international businesses and financial institutions.

## CHARM

Beyond its financial benefits, Bermuda offers a safe, welcoming community where you and your family can truly thrive. The island's high standard of living, coupled with excellent healthcare and education systems, ensures a comfortable and fulfilling lifestyle.



Bermuda operates on  
Atlantic Standard  
Time



English is the  
primary language



1BMD = 1 USD



World-class  
regulator



400  
YEAR-OLD  
Political and Common  
Law system



Compliance and  
transparency  
leader



# Reside in **Bermuda**

## ECONOMIC INVESTMENT RESIDENCY CERTIFICATE (EIRC)

Eligible high-net-worth individuals and their families can attain residency rights in Bermuda by making a \$2.5 million investment through various avenues.

- Buying real estate (residential and/or commercial)
- Donating to a Bermuda-registered charity
- Making an equity investment in an existing Bermuda-based business
- Launching a Bermuda-based business
- Investing in a social or other venture benefiting Bermuda, as approved by the Minister

## WORKING AND RESIDING IN BERMUDA

Staff members employed by Bermuda family offices are eligible to work and reside on the island, with permits valid for one to five years. Dependents, including domestic staff, may also reside on the island, subject to approval. The Bermuda Economic Development Department provides an efficient concierge service to seamlessly guide applicants through the permit process in coordination with the Department of Immigration.

For more information contact [concierge@gov.bm](mailto:concierge@gov.bm).

Interested parties can email [info@bda.bm](mailto:info@bda.bm) to schedule a confidential conversation with the Bermuda Business Development Agency's dedicated concierge service.

## EIRC INVESTMENT BREAKDOWN (March 2021 - October 2024)

**\$500**  
MILLION

Total Investments

**\$49**  
MILLION

Existing Business

**\$2**  
MILLION

Government Bonds

**\$212**  
MILLION

New Business

**\$231**  
MILLION

Real Estate

**\$6**  
MILLION

Social Ventures

# Build your **Legacy**

**Bermuda provides a diverse range of corporate structures to meet the needs of high-net-worth individuals and family offices.**

## **LIMITED COMPANY (LTD)**

A structure owned by shareholders and managed by a board of directors.

## **LIMITED LIABILITY COMPANY (LLC)**

Owned by persons holding LLC interests, managed by its members in accordance with an operating agreement.

## **PRIVATE TRUST COMPANY (PTC)**

Available for administering specified trusts, provided the company is not engaged in licensed trust business.

## **PARTNERSHIPS**

Structures formed under the Partnership Act 1902, the Limited Partnership Act 1883, the Exempted Partnerships Act 1992, or the Overseas Partnerships Act 1995.

## **INCORPORATED SEGREGATED ACCOUNTS COMPANY (ISAC)**

A structure that permits the creation and operation of multiple incorporated segregated accounts (ISAs) under a single umbrella.

## **SEGREGATED ACCOUNTS COMPANY (SAC)**

A structure that allows the legal segregation of assets and liabilities across an unlimited number of accounts operated by the SAC.





# Invest in **Opportunity**

Bermuda's legislative framework encourages transparent and secure investment practices.

## **CHARITABLE GIVING**

The Bermuda Foundation (BF), charity #948, is a limited liability and segregated accounts company. Its mission is to build a lasting fund for Bermuda's benefit by helping donors maximise their impact. As a public grantmaking foundation, BF invests charitable gifts to create a permanent asset base and responsibly manages operations to support the community.

## **INVESTMENT FUNDS AND MANAGEMENT**

The Investment Funds Act 2006 applies to all funds, whether they are established as companies, incorporated segregated accounts companies, segregated accounts companies, partnerships, limited liability companies (LLCs), or trusts.

## **TOURISM INVESTMENT ACT**

This legislation aims to encourage local and foreign developers to invest or reinvest in Bermuda's tourism industry, including hotels, restaurants, attractions, and historical sites. It offers full relief on customs duty, hotel occupancy tax, land tax, payroll tax, and deferral of landholding charges to help meet or exceed visitor expectations for luxury and quality.



# Fortify Your Future

Bermuda was one of the first international trust jurisdictions and has become known as a top domicile for trusts. The island offers a versatile range of tailored trust structures designed to meet your specific wealth management needs.

## ASSET PROTECTION TRUSTS

A self-settled trust that safeguards wealth against potential risks, with the grantor designated as a permissible beneficiary.

## CHARITABLE TRUSTS

Trusts established exclusively for charitable purposes, with the option to continue indefinitely.

## DISCRETIONARY TRUSTS

Trusts providing flexible control over asset distribution, ensuring your financial legacy is secure.

## PURPOSE TRUSTS

Specialised trusts for non-charitable objectives, allowing you to manage and direct assets according to your goals.

Charitable trusts, purpose trusts, and companies limited by guarantee are commonly used for charitable and philanthropic endeavours. These structures provide flexibility and adaptability to suit the unique goals and missions of various initiatives. Family offices interested in supporting charitable causes can also explore collaborative opportunities with existing registered Bermuda charities, which actively engage in a wide spectrum of impactful activities.

Bermuda-managed trusts are subject to the highest regulatory standards, monitored by the Bermuda Monetary Authority ensuring efficient estate planning and asset protection.



Bermuda boasts over 100 years as a leading trust jurisdiction providing fiduciary services to private clients with 25 licensed trust businesses and 180 members of the Society of Trust and Estate Practitioners (STEP).

BERMUDA LICENSED TRUST COMPANIES	
ALTREE TRUST LTD	MAPLES TRUSTEE SERVICES (BERMUDA) LIMITED
APPLEBY GLOBAL TRUST SERVICES (BERMUDA) LTD.	MERITUS TRUST COMPANY LIMITED
BERMUDA TRUST COMPANY LIMITED	MUFG FUND SERVICES (BERMUDA) LIMITED
BUTTERFIELD TRUST (BERMUDA) LIMITED	OCORIAN SERVICES (BERMUDA) LIMITED
CAREY OLSEN FIDUCIARIES BERMUDA LIMITED	QUORUM LIMITED
CLARIEN TRUST LIMITED	R&H TRUST CO. (BERMUDA) LIMITED
CONTINENTAL TRUST CORPORATION LIMITED	ST. GEORGE'S TRUST COMPANY LIMITED
CONYERS TRUST COMPANY (BERMUDA) LIMITED	STATE HOUSE TRUST COMPANY LIMITED
HAMILTON TRUST COMPANY LIMITED	THE BANK OF N.T. BUTTERFIELD & SON LIMITED
HARBOUR INTERNATIONAL TRUST COMPANY LIMITED	TRINITY FIDUCIARY LTD.
HSBC INSTITUTIONAL TRUST SERVICES (BERMUDA) LIMITED	WINCHESTER GLOBAL TRUST COMPANY LIMITED
HTM TRUST (BERMUDA) LIMITED	ZOBEC TRUST COMPANY LIMITED
LOMBARD ODIER TRUST (BERMUDA) LIMITED	MAPLES TRUSTEE SERVICES (BERMUDA) LIMITED

Email [info@bda.bm](mailto:info@bda.bm) for more information on the companies listed above, or to schedule a confidential conversation with the Bermuda Business Development Agency's dedicated concierge team.

**FOR MORE INFORMATION, PLEASE CONTACT:**

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