

CBiBank to Offer Family Trust Services, Meeting Client Wealth Inheritance Needs

UNITED STATES, November 30, 2023 /EINPresswire.com/ -- Recently, yet another family trust business managed by CBi Guardian Limited, a closely affiliated company of the emerging U.S. commercial bank [CBiBank](#), has successfully taken off. This development further reinforces the bank's commitment to fulfilling clients' needs for secure and effective intergenerational wealth transfer. Throughout the process, the bank's team excelled in handling and executing these services, winning high praise from the clients for their efficiency and professionalism.

Family trust, as a cornerstone of wealth management, is built on the foundations of assets, credit, and trust. Through these trust structures, intergenerational wealth transfer becomes feasible, facilitating deferred taxation for beneficiaries. Furthermore, assets held in trusts can be globally invested, ensuring both growth and preservation, coupled with stringent confidentiality. Notably, by effectively segregating trust assets from those of the settlor, family trusts mitigate the risk of potential legal claims resulting from business failures or unforeseen family circumstances, making them a preferred choice for high-net-worth individuals.

As an emerging international commercial bank, CBiBank has been strategically positioning itself in the family trust sector since its inception. It has progressively established a comprehensive product line covering family trusts, family charities, and family offices, thus creating a holistic wealth management service system. Harnessing expertise, a professional talent pool, and digital technology, the bank has been able to lower the barriers to entry for traditional family trusts, enabling middle-class individuals to benefit from intergenerational wealth transfer and tax deferral.

CBi Guardian, a closely affiliated company of CBiBank, operates as a trust service provider duly regulated by three New Zealand authorities: the Department of Internal Affairs (DIA), the Inland Revenue Department (IRD), and the High Court, firmly established and registered under New Zealand law. It is capable of delivering both local and offshore trust services to local businesses and residents as well as to those outside New Zealand. Leveraging CBiBank's financial infrastructure and extensive resources, CBi Guardian tailors its trust services, meeting diverse asset management needs, while striving for cost-effectiveness atop quality service provision and regular follow-ups.

Looking ahead, CBiBank remains committed to its core values of innovation, empowerment, and efficiency, continuously refining and integrating its asset management capabilities and financial

service levels. This commitment aims at enhancing the financial service experiences for its users and ensuring the secure transfer of clients' family wealth for generations to come.

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