

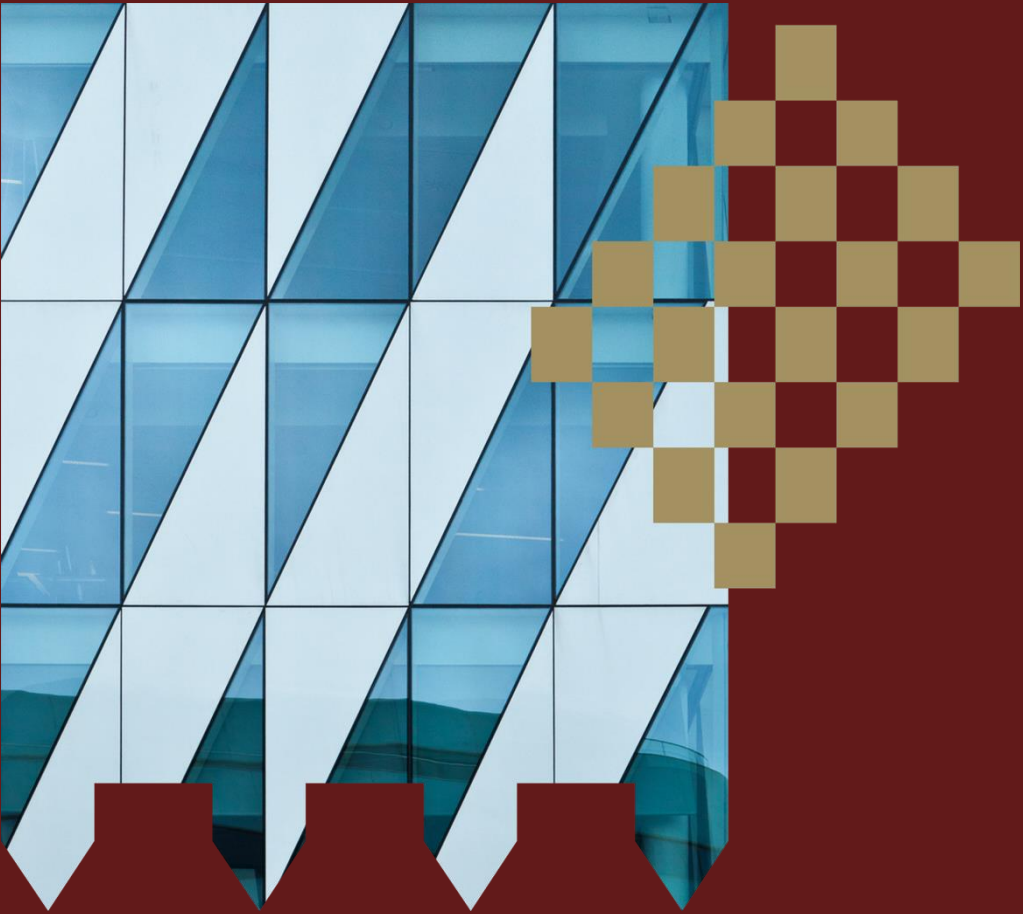
Portcullis Group

Asia's wealth management pioneer

Hong Kong • Singapore • Malaysia • Taiwan • Samoa
British Virgin Islands • Cayman Islands • Cook Islands

Family Office Services

2026 July



Asia's wealth management pioneer



18 Billion
AUA

Trusted by
families &
businesses
in 59
countries

19,702
clients

31
licences

261 staff
across
10 offices

The Portcullis advantage



Flexible partnerships,
endless possibilities.

At Portcullis, we believe in
crafting solutions that fit your
unique needs.

Whether you choose to leverage
our in-house expertise, work
with our external providers or
collaborate with your trusted
network, the power is in your
hands.



Trusted advisors,
seamless integration.

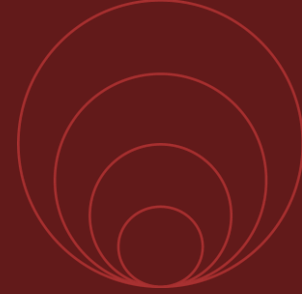
Our commitment is to work
hand-in-hand with your family's
trusted advisors.

Seamless integration ensures
that your family office setup
aligns with your existing
relationships and preferences.



Establishing family offices
made seamless.

With four decades of
experience, Portcullis has honed
the art of delivering turn-key
solutions for establishing family
offices.

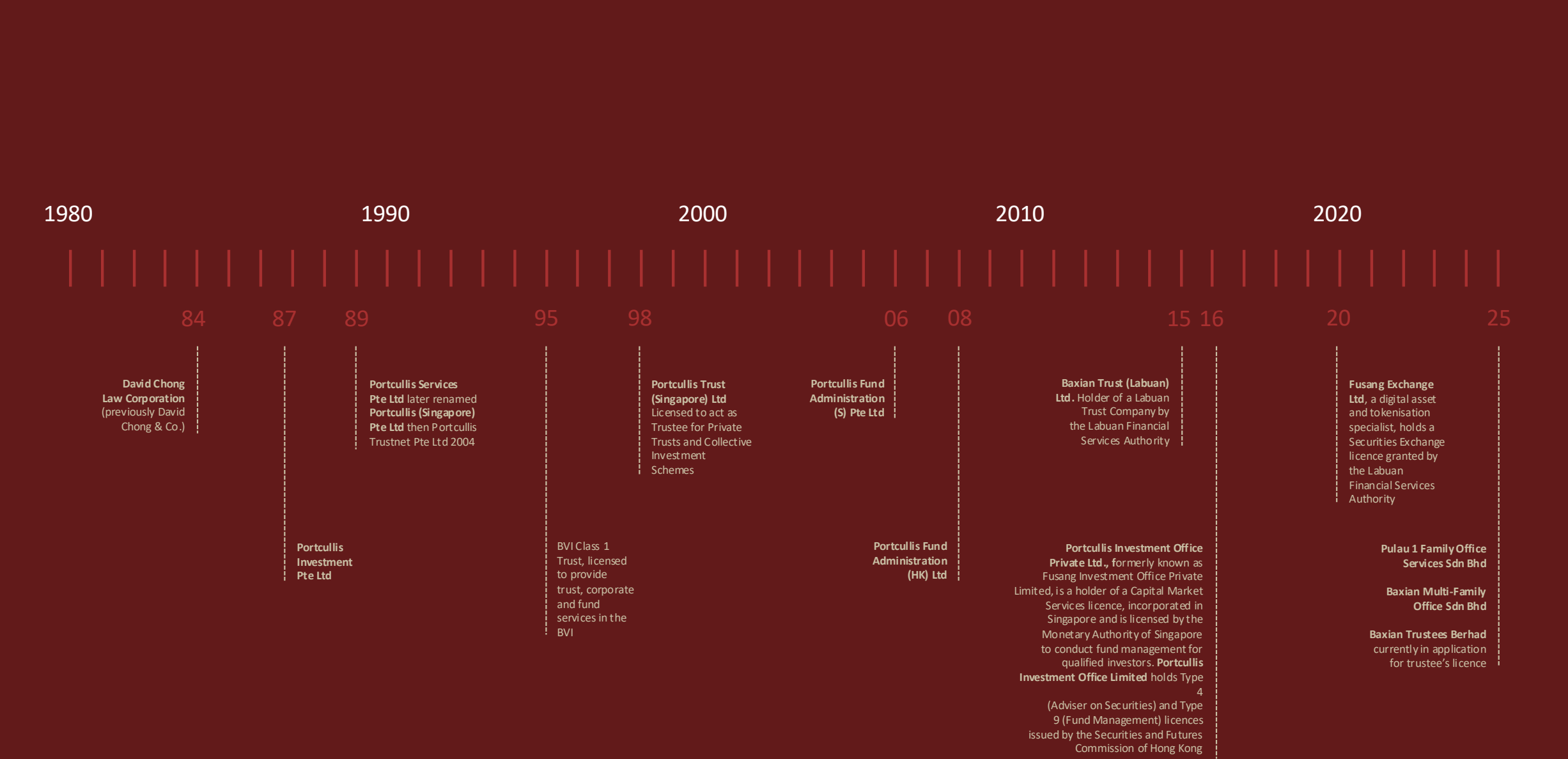


Tailored solutions, your way.

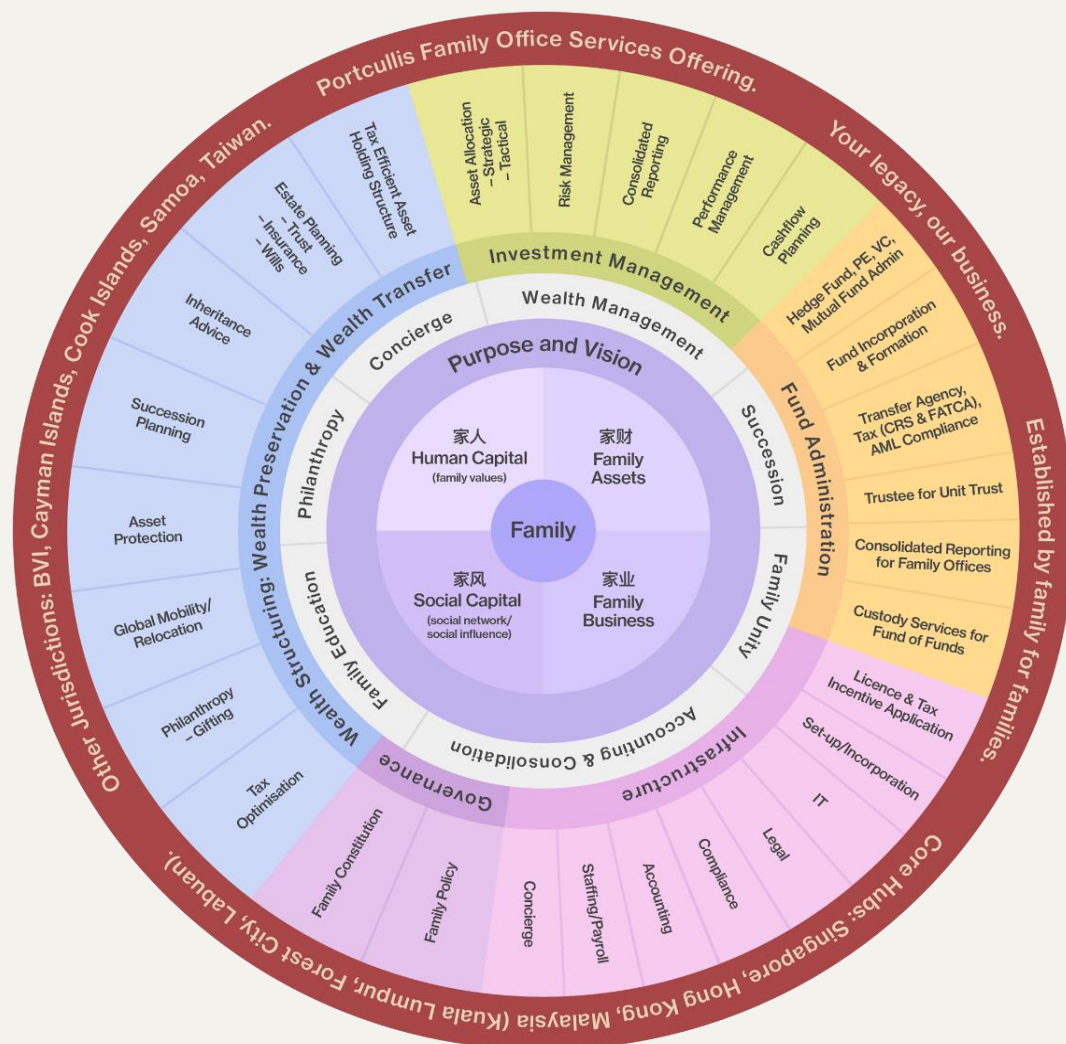
We empower you with choices.
Portcullis does not mandate the
use of our services for your
family office.

Opt for in-house services or
collaborate seamlessly with your
family's trusted advisors and
service providers.

Milestones over the years



A full spectrum of wealth solutions



For more than 40 years, Portcullis has been on a mission to create a collaborative platform to support families on their wealth management journey. Today, Portcullis offers a full suite of family office services designed to support families at every stage of the family-wealth cycle.

Most of our clients come to us through trusted referrals, drawn by our reputation for reliability, responsiveness, and expertise.

Whether working directly with the family, family enterprises or through wealth intermediaries, we support the family with the ever-growing complexities, so they can focus on wealth creation.

Family office – Providing bespoke family office advisory, governance and infrastructure services focusing on preserving, growing and transferring multigenerational wealth with discretion, continuity, and purpose.

Trust – Establish and administer trusts to safeguard wealth, ensure succession, and meet complex family and financial planning goals.

Corporate and business – Tailored structuring and advisory solutions, supporting family enterprises and companies with cross-border operations and long-term strategic planning.

Fund – End-to-end support for setting up and administering investment funds, from structuring to compliance and operational efficiency.

Investment office – Independent advisory and oversight for private investments, aligning strategy with risk appetite, governance, and long-term goal.

Wealth management in Pan-Asia core financial cities

Portcullis Investment Office, positioned in Pan-Asia's key financial hubs with asset management licenses, empowers families with tailored solutions. Our asset management entities and teams are strategically based in Pan-Asia's core financial hubs, where family office policies are among the region's most favourable—making it the ideal location to establish a family office and optimise wealth.

Investment services are housed under our licensed entities in the Pan-Asia's core financial cities:

- SFC licensed Type 4 and Type 9 entity in Hong Kong
- MAS licensed fund management entity in Singapore
- SC licensed family office entity in Malaysia



Hong Kong



Singapore



**Malaysia
(Forest City SFZ)**



Hong Kong's family office and wealth management momentum

3,380+

single family office operating in Hong Kong at end-2025

+25%

growth in the number of family offices over two years to end-2025

+220

further family offices targeted by the Hong Kong government 2026-2028

US\$ 5.4 trillion

asset under management in Hong Kong at end-2025



Sources: FSTB / InvestHK, Market Study on the Family Office Landscape in Hong Kong (Deloitte), 10 February 2026; Chief Executive's 2025 Policy Address; The SFC Asset and Wealth Management Activities Survey 2025, 2nd July 2026.

Family office setup across the region

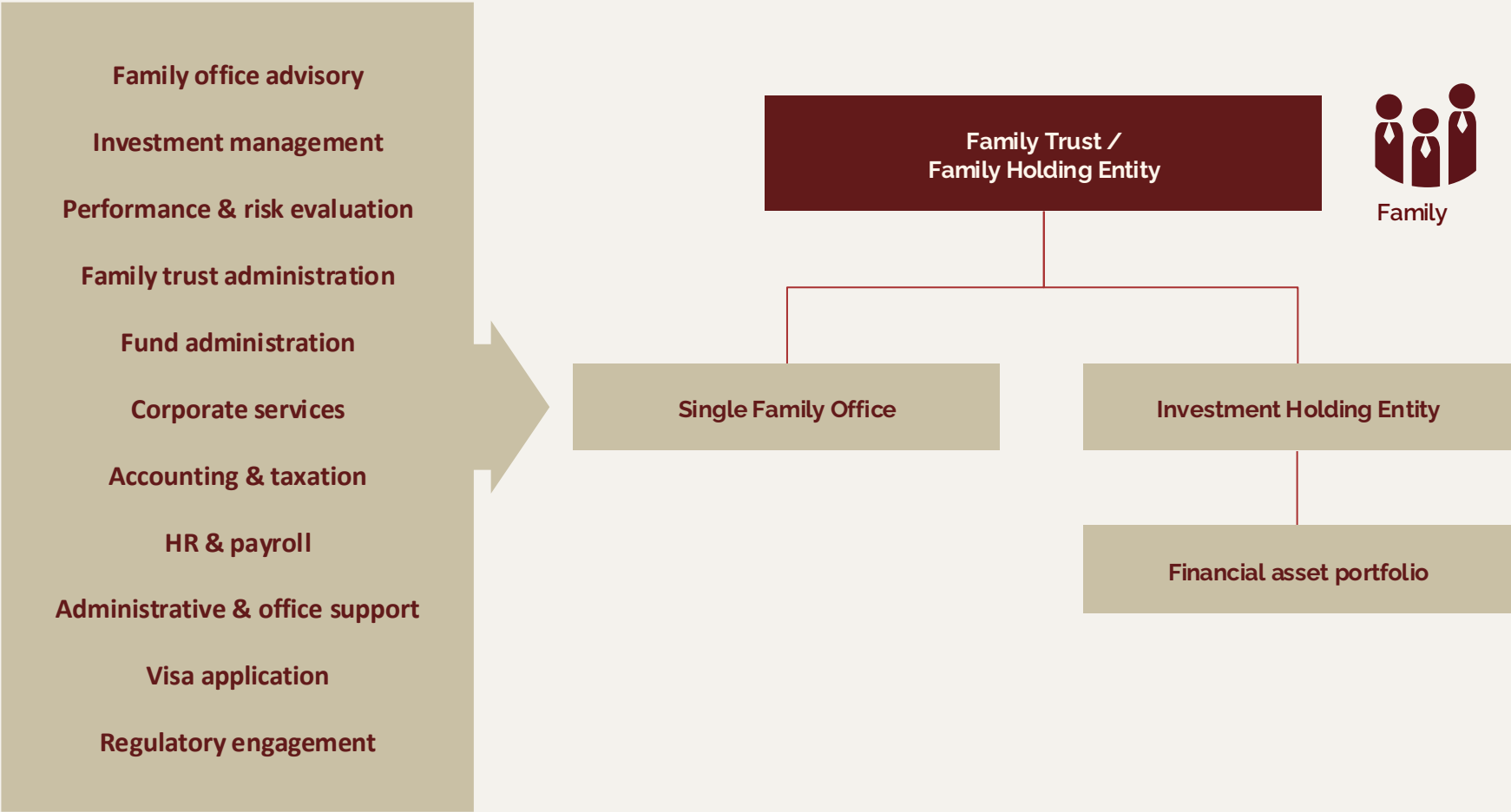
	Hong Kong	Singapore	Malaysia - Forest City	Dubai
Tax Incentive	0% but subject to annual review by HK Inland Revenue Department	0% (Specified Income of Designated Investments)	0% concessionary income tax incentive upon meeting criteria (including CGT & SD exemptions for transfer of assets into SFO vehicle)	9% Corporate Tax unless Qualifying Freezone with qualifying activities
Min AUM	USD30M (HKD 240M)	S130: USD 15M (SGD 20M) S13U: USD 38M (SGD 50M)	USD 7.5M (MYR 30M)	No strict AUM requirement
Approval Process	No approval process	6-12 months, strict MAS conditions	Fast-track approvals (3-6 months)	Quick, but new rules evolving
Real Estate & Lifestyle	Expensive property markets; vibrant business and cultural, culinary opportunities	Premium high real estate prices with some of the highest global property prices	Cost friendly living, premium property at 50-70% lower costs than SG/ HK	Competitive luxury real estate market
Wealth Planning	Deep expertise in cross border structuring with China	Established, but compliance heavy	Flexible structuring, trusts, asset protection strategies	Trust-friendly, Family Office structuring supported
Visa & Talent Pool	Rising cost for foreign talent; continues to attract international talent	Tighter EP regulations and rising costs for foreign talent	Premium visa programs, easier for foreign professionals	Streamlined visa processes, friendly EPs

Note: Dubai family office setup information is provided for comparison only. Portcullis currently does not provide services in Dubai.

One-stop shop family office solution

At Portcullis, we understand that no two families are alike, which is why we don't offer a one-size-fits-all solution. We act as a strategic partner, working alongside your family to build a flexible and resilient family office structure that is perfectly tailored to your unique goals, values, and governance needs.

Our strength lies in seamlessly integrating our core capabilities to create this bespoke structure. This integrated approach ensures that from the foundational corporate structure to the sophisticated investment operations, every component works in perfect harmony, creating a truly customized and robust single-family office solution.



Investment services

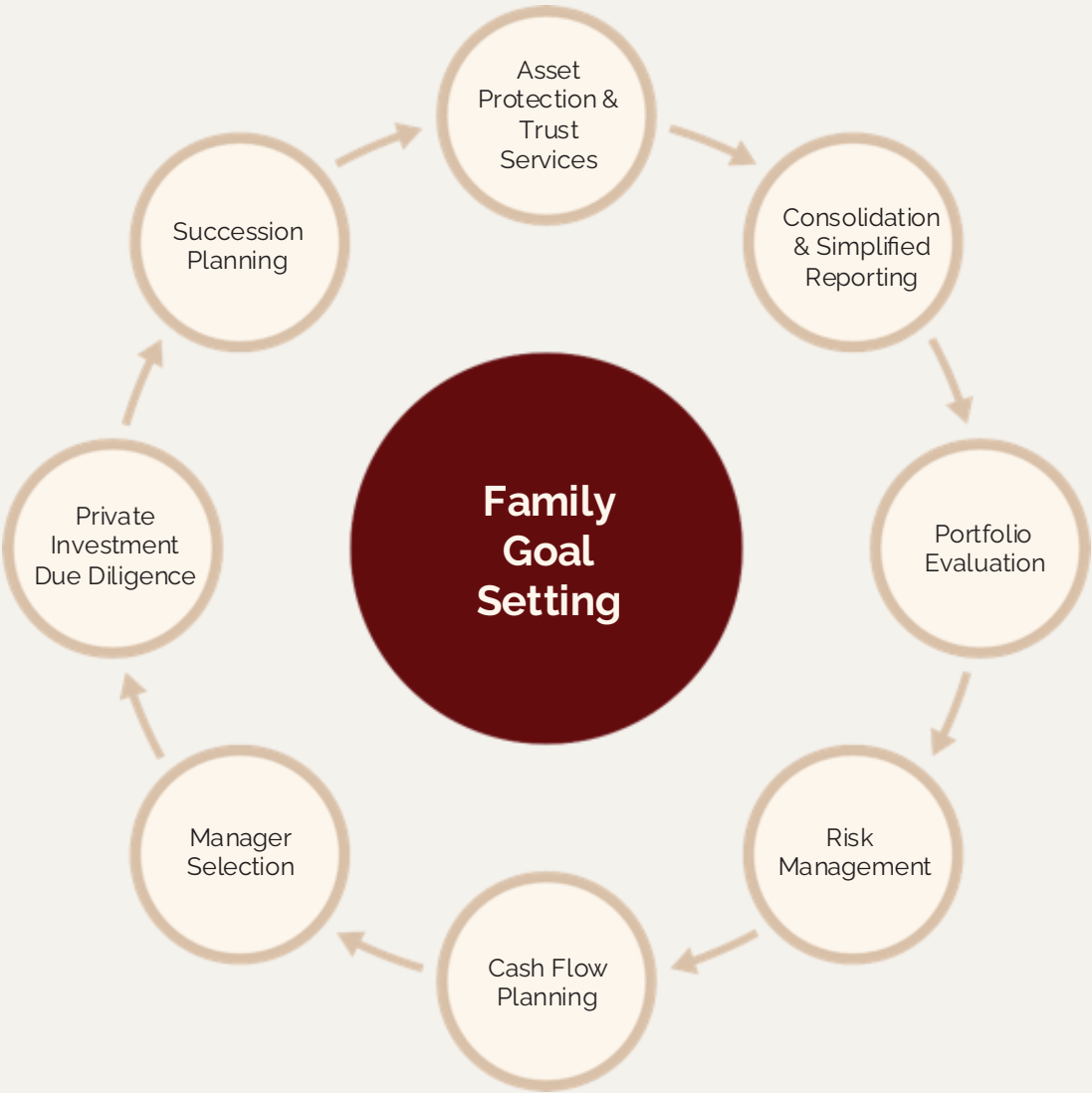
Portcullis Investment Office is a licensed financial institution whose paramount objective is the defence, optimisation, and long-term stewardship of family wealth.

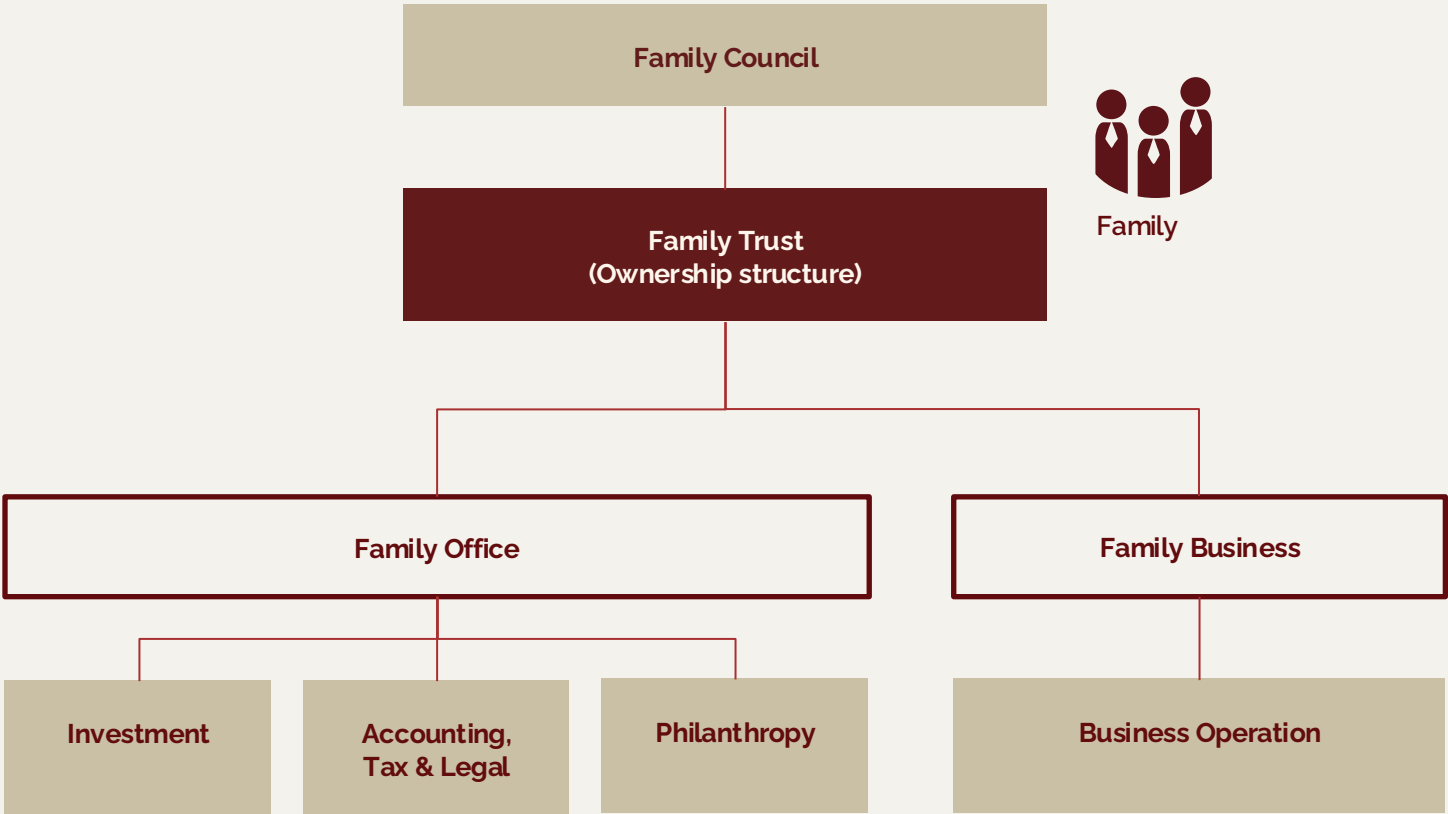
While we structurally manage sophisticated proprietary investment funds—including dedicated income and hedge portfolios—our core strength lies in providing families with an institutional-grade ecosystem of operational and strategic investment support:

Strategic Manager Selection: Independent, rigorous due diligence and onboarding of top-tier global asset managers aligned with the family’s risk tolerance.

Unified Performance Consolidation: Comprehensive aggregation of multi-asset, multi-custodian portfolios into a single, transparent reporting architecture.

Advanced Risk Analytics & Evaluation: Continuous portfolio stress-testing, asset allocation reviews, and dynamic risk mitigation strategy implementation.





A family trust is a powerful tool for wealth succession, legacy preservation, and business continuity, ensuring assets are managed and distributed according to the family’s values and goals across generations.

By establishing a family trust, families can protect wealth, minimise tax liabilities, and provide for future generations while maintaining control over business interests.

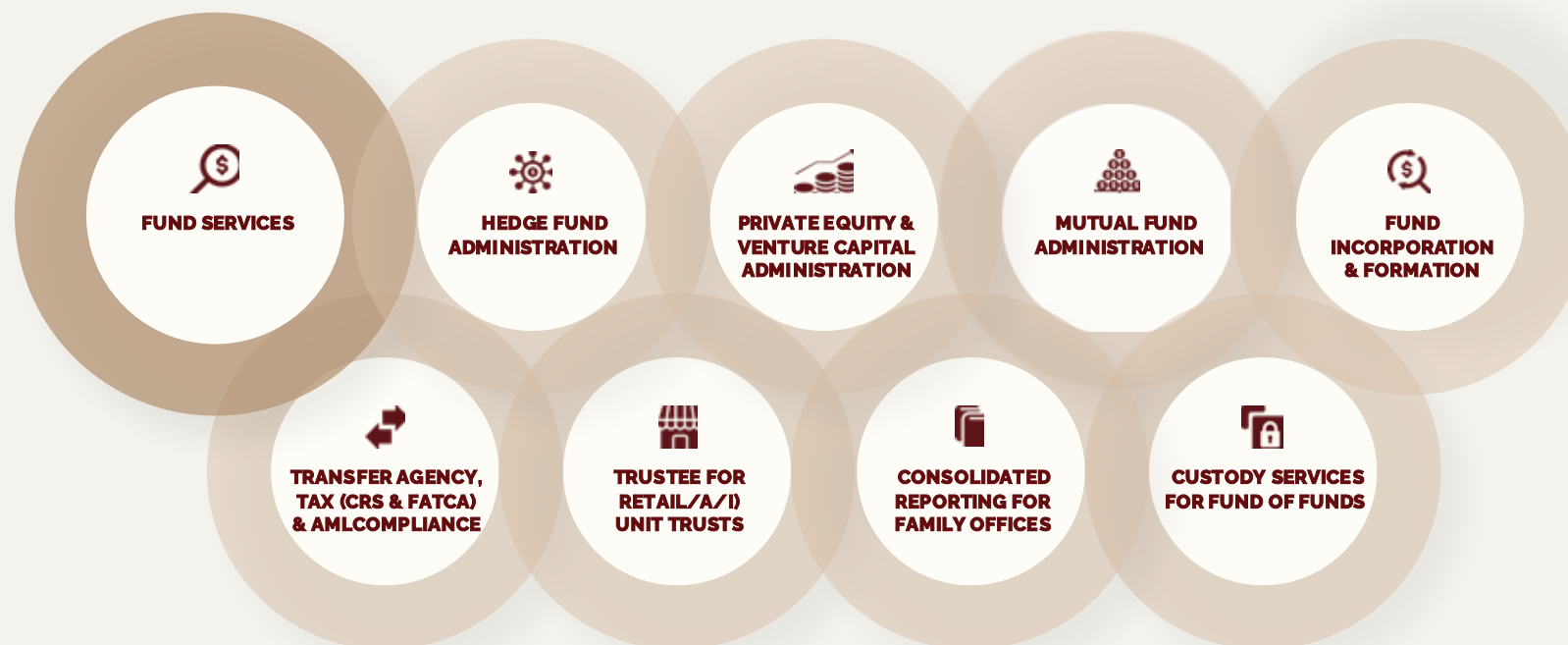
Complementing this, a family council with constitutional documentation can foster structured governance, guiding decision-making and resolving conflicts.

Together, these mechanisms create a cohesive framework that aligns financial strategies with family values, promoting unity and ensuring the enduring success of both the family’s legacy and its business endeavors.

Fund services

Our expertise and experience will prove invaluable in establishing and administering your fund.

We provide end-to-end support for setting up and administering investment funds, from structuring to compliance and operational efficiency.



Fund services accreditation



Accredited with ISAE 3402
Type 2 Certification

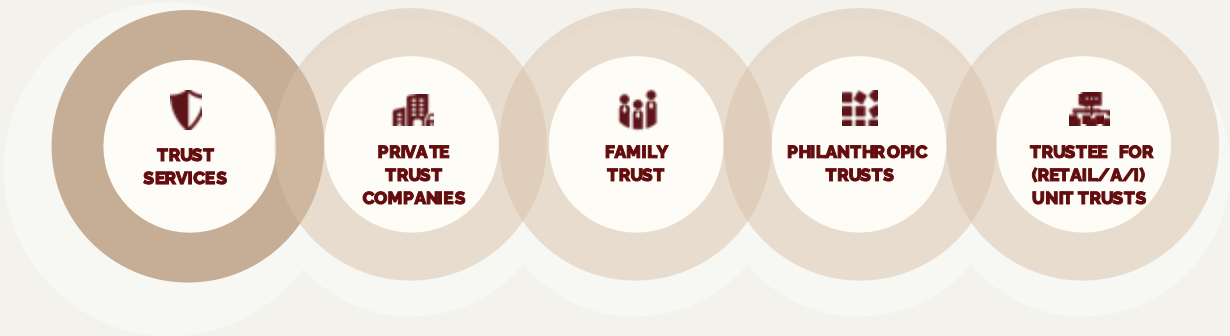


Winner of the HFM Asia
Services Award 2024 for
Best Administrator



Licensed by the MAS in
Singapore

Establish and administer trusts to safeguard wealth, ensure succession, and meet complex family and financial planning goals.

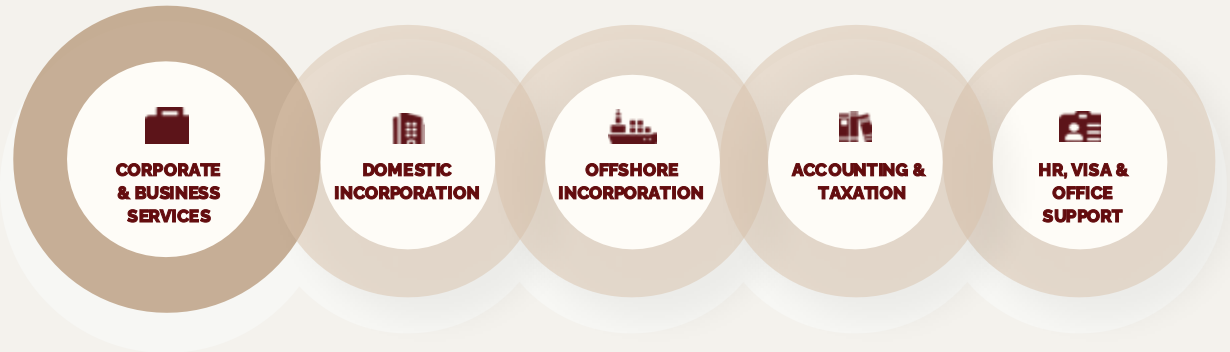


Supported with:

Incorporation Services
LTD/LP/VCC
(Variable Capital Company)
Registered Agent Services
Registered Office Services
Accounting/Consolidated
Reporting

Corporate Secretarial
Regulatory Compliance
Directorships
Tax Reporting
Redomiciliation

Liquidations
Escrow Services
Certification

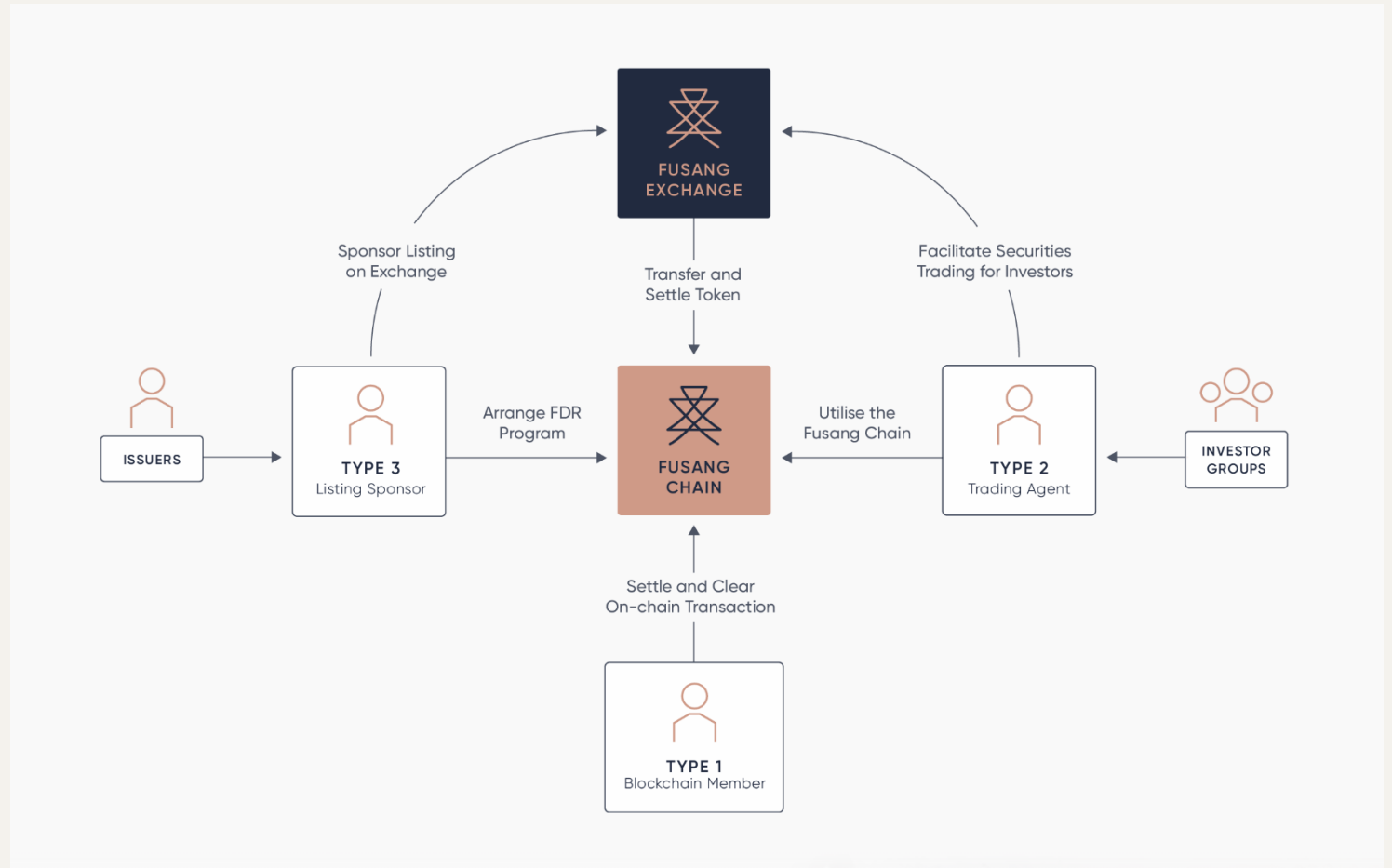


Digital asset services

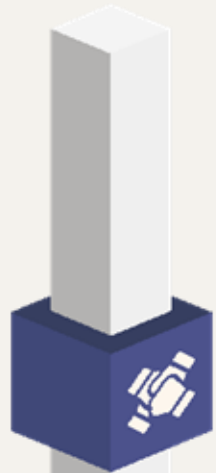
Fusang Exchange, an affiliated group company, is a fully-licensed digital asset exchange, revolutionising the financial industry with next-generation blockchain technology and emerging asset class. We empower issuers to maximise global access to investor capital through the power of tokenisation; while enabling investors to access tokenised securities and virtual assets.

Digital asset services include:

- Tokenisation of real-world assets and securities
- Listing and trading of digital or tokenised assets
- FinTech-in-a-box



The Portcullis advantages



Flexible Partnerships, Endless Possibilities

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Whether you choose to leverage our in-house expertise, work with our external providers or collaborate with your trusted network, the power is in your hands.



Trusted Advisors, Seamless Integration

Our commitment is to work hand-in-hand with your family's trusted advisors.

Seamless integration ensures that your family office setup aligns with your existing relationships and preferences.



Establishing Family Offices Made Seamless

With four decades of experience, Portcullis has honed the art of delivering turn-key solutions for establishing family offices.



Tailored Solutions, Your Way

We empower you with choices. Portcullis does not mandate the use of our services for your family office.

Opt for in-house services or collaborate seamlessly with your family's trusted advisors and service providers.

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Portcullis delivers trusted fiduciary and corporate services worldwide, combining global reach with local expertise to support clients wherever they are.

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Let's work together

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portcullis.group



Let Portcullis handle the complexity so you can focus on success. Schedule a consultation to learn how our tailored solutions can support your business journey.

Disclaimer

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