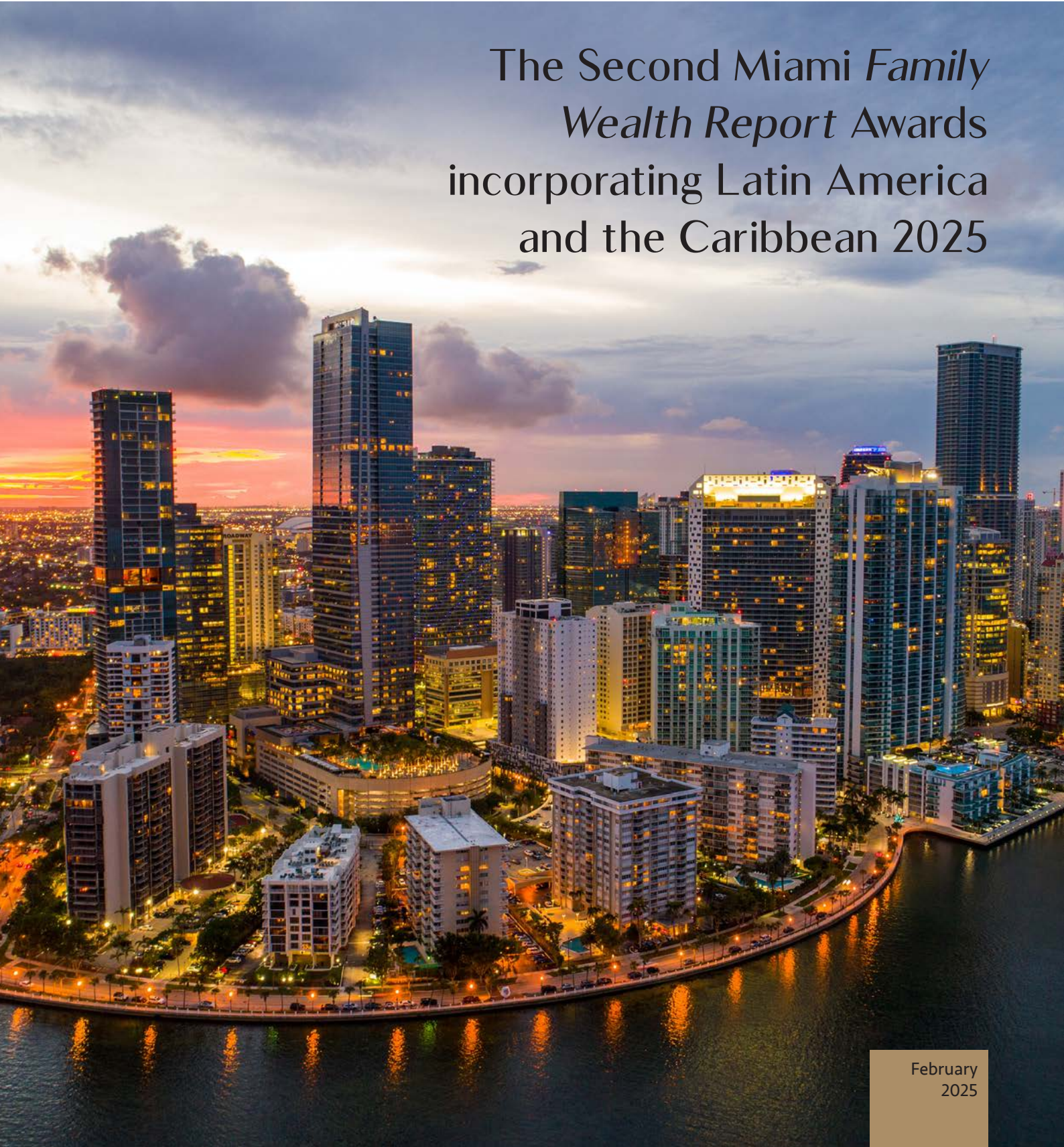




ACCLAIM

RECOGNIZING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY
THROUGH THE *Family Wealth Report* AWARDS PROGRAM

The Second Miami *Family
Wealth Report* Awards
incorporating Latin America
and the Caribbean 2025



February
2025

CRESTBRIDGE FIDUCIARY

A US JOINT VENTURE WITH  Willow Street



Crestbridge Fiduciary offers clients a forward-thinking approach to protecting and structuring wealth. Bringing together leading trust and fiduciary service providers Crestbridge Family Office Services and Willow Street, Crestbridge Fiduciary is independent and focuses exclusively on trustee services.

Client families benefit from seamless relationship management across three jurisdictions: Wyoming, Jersey, and the Cayman Islands.

Our offerings include corporate trustee services and private trust company advisory, governance, and administration.



MIAMI, LATIN AMERICA & CARIBBEAN

WINNER

Independent Trust Firm - Latin America

Crestbridge Fiduciary



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Crestbridge Fiduciary: Empowering Families with Global Expertise, Tailored Solutions and Unmatched Client Focus



Darrell King
 Managing Director, Americas
 Crestbridge Fiduciary



Crestbridge Fiduciary brings client families the benefit of two preeminent firms: Crestbridge Family Office Services, a leading Jersey, Channel Islands-based trustee and fiduciary and Willow Street, a leading Wyoming-based trustee and fiduciary. Through Crestbridge Fiduciary, families with existing or planned US-based connections can access a comprehensive and sophisticated global platform for protecting and structuring wealth.

What was the winning formula of your firm/you that explains why you won?

We believe our key difference is our people, and the close cultural alignment between the two firms behind Crestbridge Fiduciary. With the right team, and with each member in the right role, we are nimble, responsive, and wholly client-focused in whatever location we are in, delivering first-class technical expertise, and backed up by extensive in-depth experience. We also recognize the value of active and attentive listening, to truly understand our clients' needs, the essential role of clear, timely communication, and the importance of efficient turnaround. We can offer this highly tailored service because we are an independent provider, which, as we have learned, is a significant consideration for our clients and partners.

What are you going to do to remain competitive and stay ahead?

With increasing global uncertainty, our independent ownership will ensure we can continue to assess opportunities and risks swiftly, with balance and objectivity, acting quickly and decisively. We encourage a culture of continuous improvement among our team, paying careful attention to evolving client needs, and ensuring that these are identified, pre-empted, and effectively addressed. We also continue to harness new technology to enhance our efficiency, accuracy, and data security, and increase the flexibility we offer to clients.

We will remain committed wholly and exclusively to excellence in the delivery of fiduciary services. Our clients consider us part of their overall provider team, offering a specialized set of capabilities, with

expertise that can integrate seamlessly with their other providers to help achieve shared objectives.

What sort of challenges did you surmount to reach this level and how have you been able to succeed in such fast-moving circumstances?

We have, of course, faced similar challenges to other providers in this space, caused by the constantly shifting geopolitical climate. The difference lies in how our structure and culture have helped us cushion the impact of this disruption on our clients. With our team's vast industry experience comes a notably far-sighted perspective on regional and global events, and the prescience quickly to assess and respond to change. This, coupled with the more fluid operating model, has helped us to minimize impact on our clients, and quickly explore emerging opportunities. We have always placed service at the heart of our offering which, along with the ability to offer customized solutions supported by flexible and transparent pricing, have been central to our success.

Where do you see the wealth management industry and your part of it going in the next five years?

The overall trend at a service provider level is for further industry consolidation in the US market. However, with wealthy families becoming increasingly mobile and seeking investment and business opportunities outside their home borders and in niche sectors, the demand for tailored, independent trustee and specialist fiduciary support will become highly sought after.

In addition, with the transfer of substantial wealth to the rising generation well underway, well-established, embedded and long-term relationships between families and their service providers will become even more important. It's a trend that is increasing the need for structures and for the skills and judgment of experienced providers who understand how best to establish and administer them, while supporting families' needs for asset preservation, diversification, and wealth transfer. We believe we are ideally positioned to address this growing need.