

PALMELA

A DIFFERENT KIND OF FINANCIAL SERVICES COMPANY

WELCOME TO PALMELA

We are a corporate & family office services provider, offering multi-jurisdictional structuring and administration.

Your specialists in alternative assets, entrepreneurial wealth, next generation and impact investing.

Our clients enjoy exclusive access to our extensive global network of partners to help you achieve your desired results — your legacy.

Simply. Efficiently. Beautifully.





We nurture, grow and structure the assets of extraordinary people to help them make the most of their wealth.

Our founders built Palmela to be a central point of liaison for our clients. Having advised on, built and grown complex multi-jurisdictional structures over the last 20 years, the team at Palmela have a deep understanding of your needs - from individuals to multi-generational families.

We are innovators and entrepreneurs who believe in proactive planning over reactive solutions to help our clients thrive.

Our primary focus is to build and connect you with a network of collaborative and experienced people that work with us and you to plan, maintain and grow your wealth.

Whether your goals are tax efficiency, investment opportunities, fund formation, wealth preservation or adding to your collection of alternatives -

We're here, for every move you make.

MULTI-JURISDICTIONAL STRUCTURING | ADMINISTRATION | BOOK KEEPING & ACCOUNTING | REGULATORY & COMPLIANCE | CONCIERGE | FAMILY OFFICE ESTABLISHMENT | TRUST SERVICES | CORPORATE SERVICES | PRIVATE FUND SERVICES | INVESTMENT ADVISORY

ABOUT US



GENUINE EXPERTISE IN EVERYTHING ALTERNATIVE

We build elegant structures for your alternative investments.

We offer efficient, professional administration of your art collection, access to exclusive real estate opportunities, tailor-made solutions for hedge funds and private equity, and in-the-know advisory on digital assets, litigation funding and aviation.

We have worked with families with varying interests and structuring requirements, so whether your needs are simple or part of a complex structuring strategy, we can support you in every way necessary.

Managing your art collection	01
Sourcing and enhancing real estate	02
Fund establishment & admin	03
Digital asset advisory & structuring	04
Litigation funding	05
Aviation advisory	06
Bookkeeping & accounting	07
Company incorporation	08
Family office establishment	09
Regulatory & compliance	10
Investment strategy	11
Luxury asset acquisition	12

ALTERNATIVE ASSETS



START YOUR JOURNEY ONE STEP AHEAD

Our entrepreneurial clients are disruptors, changemakers and innovators who often approach wealth structuring with a blank canvas. We provide the consultation and expert guidance that make your wealth structure and strategy a masterpiece.

Knowing how to make the most of your wealth needs a team of experts. We can help you build your team, structure your wealth to be as efficient and effective as possible and advise and support along the entire business lifecycle.

Directors & committee members	01
Set-up & management of foundations	02
Set-up & management of trusts	03
Set-up & management of companies	04
Re-structuring of assets & wealth	05
Bookkeeping & accounting	06
Regulatory & compliance	07
Fund establishment & admin	08
Payroll	09
Business advisory	10
Global wealthstructuring	11

ENTREPRENEURIAL WEALTH



PLANNING THE PATH TO A SMOOTH TRANSITION

A smooth transition from one generation to the next takes planning, sometimes for over a decade.

No one family is the same, but the process we have developed to ensure that your legacy is protected and the next generations voice is heard ensures our clients have peace of mind.

Crafting flexibility into the way your wealth is structured is key. We can quickly adapt and change to the needs of your family as you require - providing a full suite of family office services for complex, multi-jurisdictional family requirements.

Directors & committee members	01
Set-up & management of foundations	02
Set-up & management of trusts	03
Set-up & management of companies	04
Re-structuring of assets & wealth	05
Company incorporation	06
Family office establishment	07
Bookkeeping & accounting	08
Regulatory & compliance	09
Beneficiary management	10
Concierge services	11
Fund establishment & admin	12

NEXT GENERATION



WHAT'S YOUR LEGACY GOING TO BE?

Impact investing is a unique venture. No two goals are the same and when working with families, each member often has varying interests.

There are numerous challenges to overcome, difficult decisions to be made, financial and asset management requirements to be met.

Whether you wish to achieve a deep level of personal engagement with your chosen cause or a lighter touch involvement, we'll work with you and our team of experts to develop the best solutions for you and your family.

Directors & committee members	01
Set-up & management of foundations	02
Set-up & management of trusts	03
Set-up & management of companies	04
Re-structuring of assets & wealth	05
Bookkeeping & accounting	06
Regulatory & compliance	07
Impact fund establishment & admin	08
ESG policy advising	09
Philanthropic structure establishment	10
Due diligence on charity recipients	11
Charitable trusts & foundations admin	12
Advanced reporting & client e-portal	13

IMPACT INVESTING

EXPERIENCE



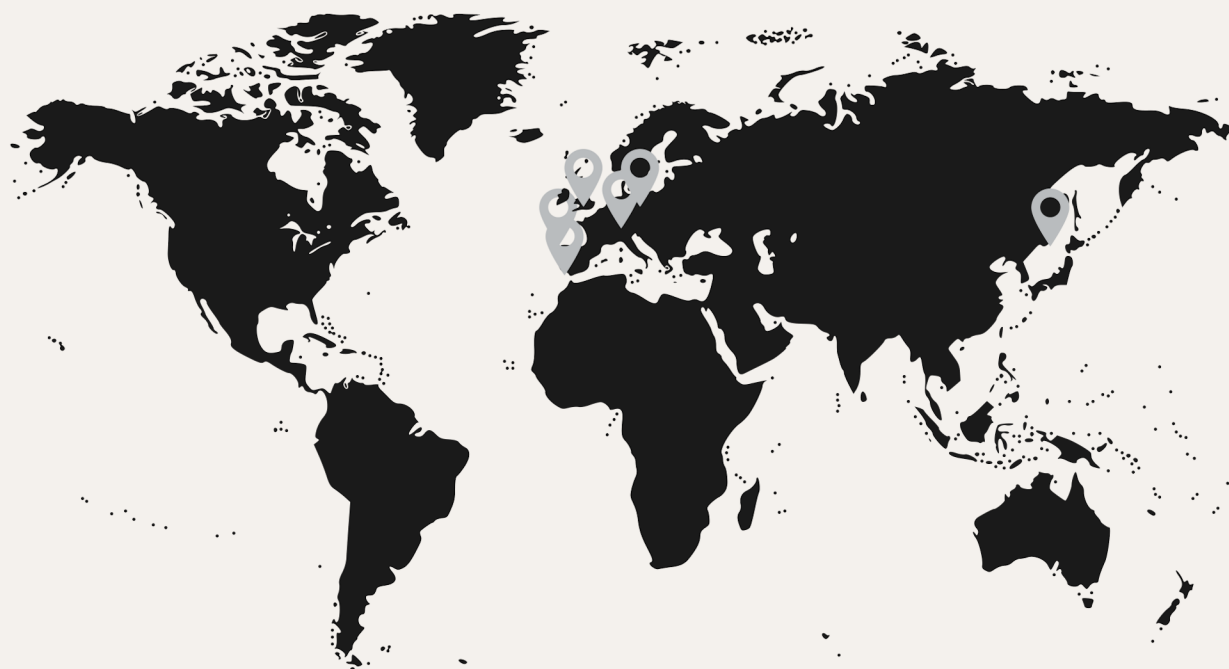
EVERY CLIENT HAS A STORY TO TELL

Our experience is defined by the individuals and families that we work with, each as unique as the next. They all add to our story. Our team have jointly experienced every facet of the private client world.

- Collaborated with local governments to plan and execute public art exhibitions and cultural development projects
- Set up a single family office from scratch (incorporating, HR, IT, operational systems and procedures, investment strategy and risk management)
- Worked with international clients, suppliers, financial organizations and other partners to manage currency exchange risks and fluctuations
- Set up the Asian Luxury practice of a leading ultra high net worth individuals (UHNWI) data intelligence firms
- Managed a complex and high-stakes project across cultural lines, changing political regimes and regulatory landscapes
- Sourced, delivered and managed a private jet
- Negotiated litigation funding agreements in HK, UK, and Australia
- Advised corporates and funds on their innovation and digital asset strategies – including a top tier \$120m market cap stable coin and a tokenized VC fund
- Provided oversight on risk and counterparty management for an internally managed hedge fund strategy

GLOBAL COVERAGE

WITH OUR TEAM AND NETWORK, WE CAN SUPPORT YOU ANYWHERE IN THE WORLD



MAIN OFFICES

London
Luxembourg
Lisbon

SATELITE OFFICES

Geneva
Hong Kong
Jersey

AREAS OF CROSS BORDER EXPERTISE

Beijing
Bermuda
Brussels
BVI
Cayman Islands
Chicago
Curacao
Dubai
Hong Kong

Jersey
Lisbon
London
Luxembourg
Monaco
New York
Shanghai
Singapore
Switzerland

THE TEAM



JESSIKA BERNS
impact & operations



LOUISE DONADIEU
marketing



HILESH CHAVDA
director London



GIANNI DE BORTOLI
director Luxembourg



JEAN-LUC GUSTAVE
director of client solutions



PIERRE ROUSSEAU
impact & sustainable finance

MEET OUR SENIOR TEAM

Our team is a striking combination of young talent and experienced professionals. We thrive on the balance between tried-and-true solutions and innovation.



TOM P.M. MEGANCK
founder & managing director

Tom served for 12+ years as the sole MD of a US\$1B+ single family office, establishing offices in Monaco, New York and Hong Kong.

His first-hand experience of setting up Family Offices and working directly with families to help them structure their wealth, gives Tom a unique perspective to Palmela clients.

Through his understanding of the needs of HNW & UHNW families, Tom has grown assets from \$250m to \$1b. His asset class knowledge spreads from Hedge Funds to Private Equity and Litigation funding.

Career highlights include:

- Design of a private equity program for a Belgian Merchant Bank
- Recruitment & management of staff for Family Office with operations in Monaco, Luxembourg, New York, Singapore and Hong Kong
- Oversight of overall investment strategy with allocation to liquid securities, private equity, litigation funding and special opportunities
- Management of a network of investment banks, asset managers, accountants, tax advisors, art dealers, financiers for a single-family office
- Project management for high end real estate projects in Monaco and New York
- Set up and management of a Single Family Office for over 10 years

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BLAKE J. NOAH

founder & managing director

Blake worked with private client service providers throughout Asia and Europe in support of their clients' luxury assets.

Prior to this, he was an executive at two private contemporary art museums, reporting directly to the principal owner and their Family Offices. Blake brings his extensive knowledge of the alternative asset class to his clients at Palmela.

Understanding how to structure and make well-thought-through decisions when it comes to this asset class is something that Blake is passionate about.

Blake has worked with HNW & UHNW families for over 15 years, not only advising, but actively sourcing alternative assets for Family Offices.

Career highlights include:

- Management of Private Museum in Beijing
- Management of Private Museum in Shanghai
- Management of network of art advisors, galleries, museums, insurance
- Collaborated with local governments to plan and execute public art exhibitions and cultural development projects

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ONBOARDING PROCESS

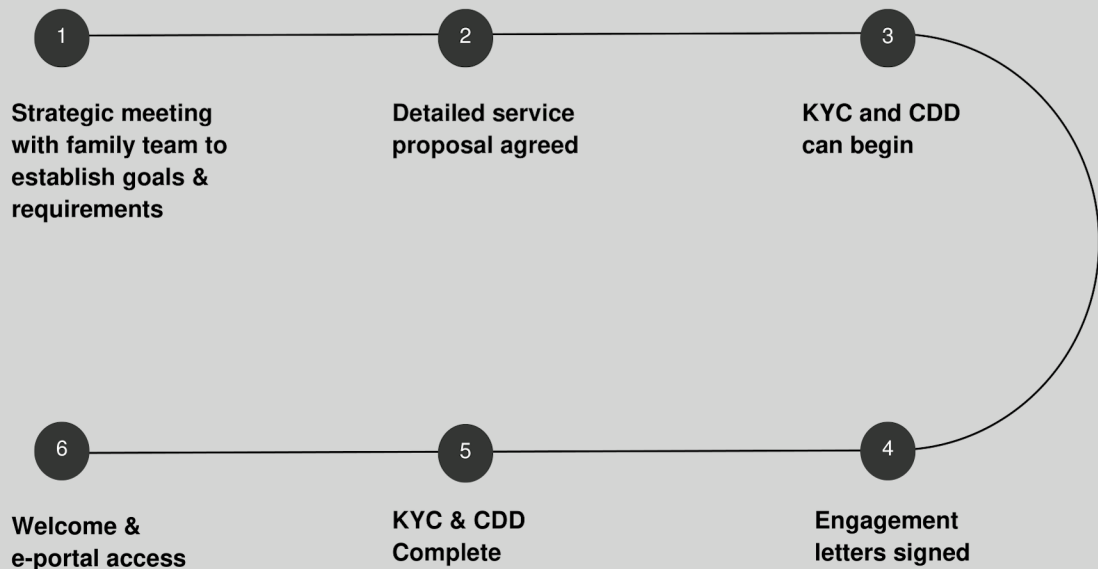
**OUR JOB IS TO MAKE MOVING TO PALMELA AS SIMPLE
AND EFFICIENT AS POSSIBLE**

Whether you're coming to us to establish a new structure, or you are looking to transfer an existing one into our care, we work with your team (or help to create a new one) to make the process as seamless as possible.

Depending on what you are trying to achieve will depend on how we approach your service requirements. But we follow a tried and tested process to ensure we are set up and ready as quickly as possible.

By working with Palmela, you have everyone you need within easy reach to structure and set up your assets to your requirements.

Our onboarding process is a few simple steps, but of course, it can depend on how quickly we can get through the KYC & CDD process. With your collaboration through this, we can have it completed in 2 weeks.





OUR FINANCIAL SUSTAINABILITY COMMITMENT

Our mission is to empower you to leverage your wealth for good, providing you with the knowledge, insights, and strategic solutions you need to make a meaningful difference.

What sets Palmela apart is our deep-rooted experience in working with families, investors & entrepreneurs for decades. We have witnessed the transformative power of sustainable wealth and impact investing, and we are committed to sharing our expertise to help you achieve your unique goals and visions. Our network of sustainability and impact professionals ensures that you receive comprehensive guidance, tailored specifically to your needs.

Creating sustainability in finance is at the core of our values and mission. We believe that sustainable finance goes beyond short-term gains and profit maximisation. For us, it means integrating environmental, social, and governance (ESG) factors into investment decisions, fostering long-term resilience, and ensuring a positive impact on society and the planet.

We are committed to guiding our clients towards responsible investment practices, supporting innovative solutions, and actively engaging with stakeholders to drive positive change. At Palmela, sustainability in finance is about creating a better future, one that balances financial success with social and environmental well-being.

SUSTAINABLE WEALTH

OUR PARTNERS

Our clients gain exclusive access to our global network of partners. By collaborating with the world's best providers, we are able to offer a full suite of services that give our clients everything they need in one place.

ANTARCTICA ASSET MANAGEMENT

Antarctica is a global leader in hedge fund and private equity research, aiming to “know and understand our markets better than anybody else.” Equipping professional investors with information and a curated offering of investment portfolios, informed by in-depth global research, operation and legal due diligence, and risk analysis.

Together, Palmela and Antarctica Asset Management are pleased to offer a wealth of experience, resources, and dedicated focus to assist our clients in investing in hedge funds and private markets to achieve broader investment objectives.

KENDRIS

Kendris is a leading independent Swiss partner specialising in tax and legal advice.

Kendris and Palmela work together to provide an all-round solution for private clients, giving clients access to custom reporting, personalised portals - an all-in-one tax efficiency service - planning and implementing structures in the most efficient way possible.

DELIO

Delio's platform transforms distribution, management, and reporting for financial institutions. Seamlessly integrating origination, distribution, transactions, and reporting, Delio improves efficiency, governance, and user experience.

Palmela gains a tailored digital infrastructure, optimising private markets, and client services. The collaboration leverages Delio's technology to offer an enhanced onboarding and due diligence experience whilst also offering transparent data sharing for private deals and funds.

QUINTET

Operating in 50 cities across Europe, Quintet are a private bank for people who see the world differently. With its reputation as a trusted financial institution, complements our expertise in the private client and private fund community.

This collaboration provides our clients with access to a comprehensive suite of private banking services.



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