



**INVICTA**  
**WEALTH SOLUTIONS**

**FAMILY OFFICE**

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# Independence with Integrity

## Who We Are?

Invicta has over 30 years' experience working with high net worth families to provide tailored solutions to allow them to maintain and enhance their wealth whilst meeting their personal needs.

Licensed by the Guernsey Financial Services Commission, Invicta is able to act as a Trustee, Protector and Director to provide a complete family office service.

Invicta can work in partnership with your existing advisers and become a seamless extension of your team, providing insights and guidance in respect of Guernsey's legal and regulatory framework.

Independently owned, Invicta is not tied to any institution and can respond to your needs with agility and decisiveness. Invicta has a strong network of international partners.

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## Why Work With Us?

Invicta has an experienced, qualified team of professionals who are well versed in Guernsey's laws and regulations and capable of supplying a high-level service with circumspection and integrity.

Understanding the needs of multi-generational families, their aspirations and expectations, Invicta appreciates one solution does not fit all and our team work keenly and effectively to realise each client's expectations.

Invicta works diligently to enhance clients' wealth, applying its extensive experience and knowhow to grow and nurture assets under management.

As a client receiving Invicta's family office service, you would benefit from a robust governance and management structure, giving you comfort that your wealth is in the safest of hands with those responsible having primary concern for your family's future.

## Family Office Services

- Trust Establishment
- Estate Management
- Personal Banking and finance structuring
- Real Estate purchase and management
- Philanthropic activities
- Management of Luxury Assets
- Family Governance and succession planning

## Key Contacts

Our experienced team comprises trust, legal and accounting professionals who provide an exceptional bespoke service to clients.



Jim Elliott  
CEO

Jim joined Invicta in 2008 and was appointed CEO in May 2016. Jim is a highly qualified and experienced trust professional who provides an open leadership style to the wider Invicta team. With an approach to client service that is founded on his strong technical know-how, Jim works with clients across the Globe and, particularly, in Southern Africa. Before Invicta, Jim worked at a large, bank-owned fiduciary in Guernsey, administering structures for ultra-high net worth clients.

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James Dumont-Gale  
Chief Financial and Operations  
Officer

James joined Invicta in July 2017 as Client Accounts Manager and was promoted to Finance Director in November 2019. James was promoted again in January 2021 and is now Invicta's Chief Financial and Operations Officer and joined the Invicta Board in October 2021. James contributes in a number of areas of the business from internal management finance to assisting Invicta's global client base with accounting and finance solutions. James originally qualified as an accountant at PwC.

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