



FORWARD GROUP

Private Client | Corporate | Funds



ABOUT FORWARD GROUP

AT FORWARD, WE FOCUS ON YOUR FUTURE.

This document is not tax advice and should not be relied upon as such.

ABOUT US

Forward thinking and progressive.

Forward Group is a fiduciary, fully independent, owner-managed Private Client, Corporate and Fund Services business free of institutional ownership since its establishment in 2007 renowned for our integrity, discretion and responsible attitudes.

Forward Group has assembled a team of experts in administering bespoke structures for high net worth and ultra-high net worth private and corporate clients who need skilled assistance with their wealth management and succession planning requirements.



Our focus is to place our clients at the heart of everything that we do, always delivering a personal service of the highest quality to achieve our clients' objectives.

Forward Group grew out of our sister Chartered Accountancy business, GS Accountants. We took the core beliefs that made GS a success, and applied them to Forward. We build long term relationships, based on a quality of service and our other core values, but at a fair and clear price.

Our approach may be different, but we focus on what we believe are the important factors for our clients, such as the quality of staff and their long term retention, so that clients and staff will build trust and understand each other. We don't see how a Trust company can be run any other way. No client of Forward is ever just a voice in the crowd.



OUR EXPERTISE

Forward Group is an owner-managed business providing bespoke relationship-led solutions to private and institutional clients.

Free from institutional ownership, we pride ourselves on putting the needs of our clients first by working with them and their advisers to meet their long-term aspirations and objectives. We believe that communication is key to every client relationship and take the time to get to know our clients. To achieve this, Forward Group operates a director-led business model ensuring the highest level of client service through experience, commitment and attention to detail.

For Forward, a client is more than a number on a balance sheet, it's a relationship. A relationship with your fiduciary is built on trust, and is a relationship that is paramount to our clients. Without that fundamental building block then we would be unable to understand our clients needs and wants and to ensure they receive the level of service they have a right to expect – that is why building and reinforcing the relationships we have with clients is such an important part of the Forward ethos, and one of the core values.



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Why us? It's all about trust.

We are more than just a team at Forward, we have a family spirit at heart and work with the utmost honesty and integrity at all times.

We deliver for our clients through personal service and going the extra mile in the relationships we look to build. Being here to help and support every step of the way in a creative, positive and professional manner is what we do.

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OUR VALUES

Our core values are at the heart of what we do, why we do it, and how we do it.

Forward for a Reason

When Forward was created we picked the name for a reason. Those reasons are enshrined in our core values and those core values are at the heart of what we do, why we do what we do, and how we do what we do.

Our core values are built from the ideas and thoughts of our team.

When you become a client of Forward we share our values with you. You are more than a client to us.

We are not looking to be the biggest, but we do want to be the best.

At Forward, we focus on your future.

WE PROMISE WE WILL

- || Deliver wow with all that we do – impress our clients and look to exceed customer expectation.
- || Be open to new ideas; the differences between us that make us all unique. We are forward thinking.
- || Embrace change for the better, even if it presents short term challenges. We move forward.
- || Work tirelessly for our clients' best interests to ensure total customer satisfaction.
- || Be creative, open minded and adventurous even if sometimes it takes a little weirdness.
- || Improve our skillset, embrace learning; developing our team into the best they can be. We leap forward.
- || Do more with less. Be innovative, come up with unique solutions. We are forward looking.
- || Build relationships based on openness and honesty in all communication.
- || Be progressive, never stand still. We put our best foot forward.



OUR JOURNEY

GS Administration Limited incorporated as subsidiary of GS Accountants and issued with Class O licence by the JFSC.

**31 May
2007**

**20 Jul
2017**

GS Administration Limited issued with Class F, I, J and M licences by the JFSC.

Change of ownership: Moved away from the accountancy practice. GS Administration Limited wholly owned by Alun Griffiths as the two businesses diverge.

**1 Nov
2017**

**7 Mar
2018**

Change of name from GS Administration Limited to Forward Group Limited to separate business from the accountancy practice.

Forward increases service offering with Class G, K and L licences awarded by the JFSC.

**11 May
2018**

**11 Jul
2022**

Debbie Du Feu joins with over 30 years of fiduciary experience and is appointed to the Board on 13 September 2022.

Justine Goodwin joins with over 30 years of fiduciary experience and is appointed to the Board on 1 January 2024.

**1 Aug
2023**

**1 Oct
2024**

Bronwyn Kirwan joins with over 25 years of fiduciary experience and is appointed to the Board on 2 January 2025.

Debbie Du Feu and Justine Goodwin become shareholders of Forward Group Limited.

**17 Sept
2024**

**17 Mar
2025**

Forward Group issued with Class H, U, V, W and ZK licences by the JFSC.

Kelly Moore joins with over 25 years of fiduciary experience and is appointed to the Board on 22 April 2026.

**2 Jan
2026**



WHY FORWARD?

Forward Group may be a young company, but it is one that brings together a wealth of experience to create an exceptional team. We hand pick our staff obsessively, not only because we want the best, but also because those team members need to be as obsessive about customer service as we are.

We make Forward a great place to work, not only because we all like working in a great working environment but, by ensuring our staff's happiness. This ensures that our staff will stay with Forward for a long time, allowing them to build those relationships with clients that we believe are absolutely essential to delivering the best service and gaining a deep understanding of clients' needs.

As well as establishing new structures, we specialise in fixing the broken, taking those structures that have, for whatever reason, been neglected over the years and where that lack of attention has resulted in complications that are hampering the correct function of the structure now.

Building on our Chartered Accountancy roots, we are happy to work through to resolve tax complications with authorities, working and understanding the language of professional advisors. If you need to move Forward – we are here for you.

Our core values are who we are and who we aspire to be. We are fresh, offering a traditional, perhaps even old fashioned belief in service, but delivered in a modern way, utilising the best ways we can in terms of technology and ways to interact with our clients.

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| <p>Thank you for all your help, but especially for the way Forward pulled out all the stops over Xmas and New Year!</p> <p>Corporate Services Client</p> | <p>Thank you! For the first time in over a decade I understand the financial position of our structure. I wish I had found Forward earlier!</p> <p>Private Trust Company Client</p> | <p>You are the best Trustees I have had in 30 years!</p> <p>Private Client</p> |
| <p>I have been waiting for so long for this!!! In just a few days you did it. Thank you, thank you!</p> <p>Private Client</p> | <p>Great work here! Was really solid and great support.</p> <p>Corporate Services Client</p> | <p>Thank you for being so proactive in helping complete the opening of this account so quickly</p> <p>Private Client</p> |
| <p>Thank you very, very much for the excellent work over the last few weeks. I really appreciate everything you did and the speed at which you did it.</p> <p>Private Client</p> | <p>I just wanted to say I'm really happy with my experience of working with your team the speed you respond is incredible and I'm really glad I picked your company.</p> <p>Private Client</p> | <p>I must thank you for all the information & clarity you provided. You are by far the best of all the professionals in this area that I have dealt with since I started the estate planning exercise.</p> <p>Private Client</p> |



OUR SERVICES

Corporate

- Corporate Secretarial
- Director Services
- Nominated Person Services
- Economic Substance
- Financial Accounting and Bookkeeping
- Incorporation Services
- Company Administration
- Corporate Governance
- Special Purpose Vehicles

Family Office

- Charity & Philanthropy
- Family Business Succession
- Fiduciary Services
- Luxury Assets
- Private Trust Companies
- Wealth Structuring

Jersey Private Funds

- Very Private Funds

Private Clients

- Family Investment Companies
- Foundations
- Intellectual Property
- Limited Partnerships
- Marine and Aviation
- Private Company Holdings
- Real Estate Investments
- Trust Administration

OUR CLIENTS

Forward Group supports a well designed and administered structure to help support a clients' objectives. We work closely with our clients and their advisors at all stages of the wealth cycle to ensure their legacy is protected and safeguarded for the lifestyles of generations to come.

Our expertise ensures that we work with you to provide the solutions to help achieve wealth goals with the levels of high-quality service our clients have come to expect.

Our typical clients include:

- High net worth individuals and families
- Entrepreneurs
- Business owners
- Executives

We can support small-medium sized businesses, high net worth families and multinationals through the business cycle. From incorporation to mergers, acquisitions and complex re-organisation across a multitude of sectors, the team at Forward Group can provide the support and guidance to allow you to continue to focus on your business activities.

Our expertise ensures your goals are achieved on time in a cost-effective manner, ensuring compliance with ever changing rules and regulations.

Providing highly skilled outsourced Family Office services that does not require you to have a fully staffed business, with premises and associated costs.

The world is a smaller place and we find members of high net worth and ultra-high net worth families live in multiple locations and time zones, resulting in the need for a tailored and discreet administrative support framework to help the management of financial and non-financial needs.

We offer a holistic service and take time to listen to the family story, traditions, aims and aspirations. We can offer a Private Office service that will work closely with the family and their trusted advisors to create a solution that is bespoke to the individual needs and goals. Our role is to offer more than just administration services to become a valued resource allowing you to focus on the things that you treasure the most.

FORWARD IN NUMBERS

£1bn+

Assets under
administration

25%

Growth
year on year

<5%

Staff turnover
over last 5 years

120+

years Directors'
experience



Talk to us about your next step forward.



Alun Griffiths

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Be progressive,
never stand still,
always move
forward.



Debbie Du Feu

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