

CLERMONT TRUST

About us

The Clermont Group is an owner-managed fiduciary services business with presences in Switzerland (Geneva), the British Virgin Islands, the United Kingdom, Mauritius, Cyprus and the United States of America (Delaware). Clermont provides bespoke wealth solutions for families, investors, institutions and entrepreneurs. Founded in 1996 by U.K. based S.A. Chartered Accountants, we are independent and free from shareholder interference or conflicts of interest. We therefore do not provide investment advisory or asset management services or products. This independence allows us to uncompromisingly put our clients and the wealth managers who serve them at the heart of our commercial relationships.

Value proposition

Our approach is different. Clermont prides itself on providing fiduciary services of the highest quality while adhering to a long-term, relationship-based model designed to best serve our multi-generational high net worth ("HNW") clients and their businesses. This necessitates a bespoke, multi-jurisdictional, open architecture philosophy aimed at facilitating our clients' and their professional advisors' requirements. We focus on listening first to ensure we can provide pragmatic and useful advice, ultimately saving our clients time and producing first-class results.

Our team of over 60 includes: lawyers qualified in seven jurisdictions; chartered and certified accountants; CFA charter holders; a UK chartered tax advisor and STEP qualified individuals, with fluency in over 15 languages.

Services offered

- Multi-Family Office services
 - Wealth solutions and estate planning strategies for all asset classes, including real estate
 - Investment, Treasury, Accounting and Consolidated Reporting
 - Facilitating commercial transactions and managing third party professional advisers
 - Business Advisory and Philanthropy
- Private Clients
 - Trusts, foundations and private trust companies
 - Offshore companies
- Corporate Clients
 - Holding or Trading Companies

Key individual

Martin Chesler (CA (SA), Group CEO)

Born in South Africa, Martin graduated from the University of Cape Town in Commerce and Accounting and qualified as a South African Chartered Accountant. He joined the Clermont Group in 2003. Martin acts as a strategic advisor to high-net-worth clients and international families and is a Director of several regulated financial services firms.

Contact person

Tania Steven Jennings (BA LLB LLM) (TEP)

Tania graduated from the University of Cape Town with Master's degree in Tax and Company Law and was admitted as an Attorney and Notary Public of the Cape High Court. She joined Clermont in 2015 bringing over 15 years' experience in Trust and Estate planning for South African families in relation to both their local and cross border estates.

Contact details

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Regions supported

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Reference and pricing

Use Reference code: Allan Gray Adviser Services to receive an initial consultation at no charge.