

Market Client scope



Below is the list of countries and scope of clients eligible for OneLife's solutions.

In Europe,

clients with fiscal residency in the below countries (*including nationals and expats*):

- Belgium
- France
- Luxembourg
- Portugal
- Spain
- Finland *
- Sweden *
- Denmark *

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Outside Europe,

currently and upon their request (*reverse solicitation only*) we can do for **Expat clients** being **nationals of UK + Belgium + France + Luxembourg + Portugal + Spain + Denmark + Sweden + Finland**, and residing in

- Brazil (*limited scope to pre-existing offshore structures*)
- Colombia
- Ecuador
- Hong Kong
- Israel
- Malaysia
- Mexico
- Monaco
- New Caledonia
- Peru
- Polynesia
- Singapore
- Switzerland (*min EUR 500,000 + Swiss resident benefiting from lump sum taxation regime*)
- Thailand
- Venezuela
- Vietnam

Outside Europe,

larger scope than list above for **Professional expats** dealt on a case by case basis.

Cumulative conditions (*still subject to case by case analysis*)

Client must be:

- Individual (*no legal entity*)
- National of France, Belgium, Luxembourg, Spain, Portugal, Denmark, Sweden, Finland
- Temporarily expatriated outside Europe (*anywhere in the world except blacklisted/CIMA countries*)
- Maintaining economic ties with their home country
- Applying on reverse solicitation basis
- Holding directly the assets for investment
- Applying to Death cover option
- Not managing the assets directly (*discretionary mandate required*)
- Looking for protection and stability of Luxembourg + wealth planning continuity while leaving abroad and then moving back to home country

In any case, outside Europe we can only do this upon **reverse solicitation** (no active marketing) and **application must be signed in a country where the broker is registered/passported** (electronic signature possible).



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