KINGSLEY
PRIVATE OFFICE

THE KINGSLEY NEXT GENERATION PROGRAMME · OVERVIEW

A decade that prepares the next generation to steward the family's capital.

Residency, university, career and family capital, planned as one sequence from the mid-teen years into the mid-twenties and coordinated through one long-term relationship. U.S. permanent residence is the first step.

Ages 15 to 17 · Establish

The family roadmap

- EB-5 eligibility and family strategy
- Source-of-funds plan
- Pre-immigration tax coordination
- U.S. university roadmap

Ages 17 to 19 · Enter

The path into America

- Petition with U.S. counsel
- Admissions strategy and applications
- Consular or adjustment process
- Relocation planning

Ages 18 to 23 · Build

Capability

- University support and mentoring
- Swiss Finance Academy modules
- Internships and exposure
- Permanent-residence milestones

Ages 22 and beyond · Lead

Family capital

- Career strategy
- Swiss Finance Institute residency
- Family-enterprise capability
- Family wealth relationship

What the family receives

A written roadmap
Responsibilities and critical dates across immigration, tax, admissions and career.

An annual review
A formal review of the roadmap with the family each year.

Regular reporting
Written progress reports on an agreed schedule, with prompt notice of any issue.

A document room
One controlled, confidential place for the family's documents.

One relationship, specialist institutions behind it

KINGSLEY PRIVATE OFFICE	Family strategy, relationship management, programme coordination and documentation.
INDEPENDENT U.S. IMMIGRATION COUNSEL	Immigration legal advice and filings.
SWISS FINANCE ACADEMY AND INSTITUTE	Education, career development and family-enterprise preparation.
SWISS FINANCE PRIVATE WEALTH MANAGEMENT	SEC-registered investment advisory services and family wealth management.
BRITANNICA CAPITAL	Private investment management for eligible investors.

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