

Octium Life Insurance Solution Greece Wealth Transfer and Protection



Octium Life Insurance Solution Greece is a single premium, unit-linked whole of life insurance contract designed for High Net Worth Individuals and their families to achieve wealth transfer and protection along with a long-term investment planning.

Life insurance is perfect for today's financial climate, providing a unique, efficient, compliant and transparent solution.

Clients' needs and concerns: Solutions offered by Octium

Asset and Policyholder Protection



- Life insurance and its underlying assets are protected against creditors' claims
- Policy underlying assets are segregated from the insurance company's assets
- Octium is one of the strongest cross border life insurance companies in Europe

Agility



- Life insurance is an agile product and gives clients the flexibility they need to suit their particular situation
- Life insurance is a simple, flexible and unique wealth planning tool, which can be combined with other structures (e.g. Trusts, Foundations, Holding Companies, etc.)

Wealth transfer and succession planning



- The policyholder can freely and confidentially appoint beneficiaries
- The beneficiary clause can be changed anytime
- Various death benefits available also with premium protection option
- Smooth and immediate transfer of the death benefit to the beneficiaries, in accordance with the policyholder's instructions

Underlying investments



- Wide range of eligible assets underlying the policy, professionally managed by selected asset managers
- Policyholder may select the investment strategy, which can be changed anytime

Taxation



- No taxation on insurance premiums
- Tax deferral during the holding period
- Death benefits may be subject to ordinary inheritance and/or gift tax in Greece
- No VAT on asset management and custody fees

Mobility



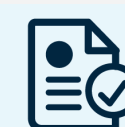
- Life insurance is an international portable solution, recognized in the EU and in almost all International locations
- Movement of beneficial ownership abroad

Privacy



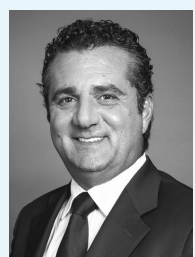
- No recurring reporting obligation for the policyholder
- In scope of Automatic Exchange of Information

Compliance



- Life insurance is a fully compliant solution to hold and invest assets abroad

For further information please contact:



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Octium Life DAC is a subsidiary of Octium Holding Ltd. and is registered in Ireland.
Octium Life DAC is regulated by the Central Bank of Ireland. Registered Company No. 367637.
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