



Kim Morgan

Manager

Location

BERMUDA

Contact Details

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Practice Expertise

- Trust & Private Client

Kim Morgan is a trust manager with Codan Trust Company Limited. Kim has over 14 years of experience in the financial and fiduciary services industry, working primarily with high net worth clients.

Kim has a wide range of experience in trust management, including employee benefits trusts and charitable trusts, within which a wide range of assets are managed. Kim's portfolio of assets include private equity, portfolio assets, fine art and commercial and residential property. Kim manages an administration team that is focused on numerous structures where a family office or a private investment office is involved.

Professional Background

- Senior Corporate Trust Officer, Bank of N.T. Butterfield & Sons Limited, Hamilton, Bermuda
- Independent Financial Consultant/Employee Benefits Consultant, Caversham Buchanan Limited, London, UK

Education

- University of Wales, MBA, 2003
- University of Hertfordshire, B.A. (Hons), Business Administration, 1996

Professional Qualifications

- STEP Diploma in International Trust Management
- Certificate in Financial Planning (1,2 & 3)

Industry Associations

- Executive Member, Society of Trust and Estate Practitioners (STEP)

Language

- Welsh