



CORP SERVICE | COMPLIANCE | HR ADVISORY

# SINGAPORE SINGLE FAMILY OFFICE 13O | 13U | 13D

Prepared by AVA in Jan 2026



# ABOUT US



## AVA GROUP SINGAPORE

AVA is committed to providing a wide range of services, including information consulting, compliance advisory, corporate taxation, identity planning, and global asset allocation for financial institutions, technology companies, global enterprises, and high-net-worth individuals. Our service scope includes:

**Corporate Services:** Company structure optimization and incorporation, corporate secretarial services, compliance consulting, HR support, corporate financial advisory, and financial licence applications.

**High-Net-Worth Services:** Services for high-net-worth individuals include global mobility support, tax planning, family office setup, succession planning, and banking solutions.

**7/24**

Service Online

**100%**

Client Satisfaction

**800+**

Corporate Clients

**200+**

High-Net-Worth Clients



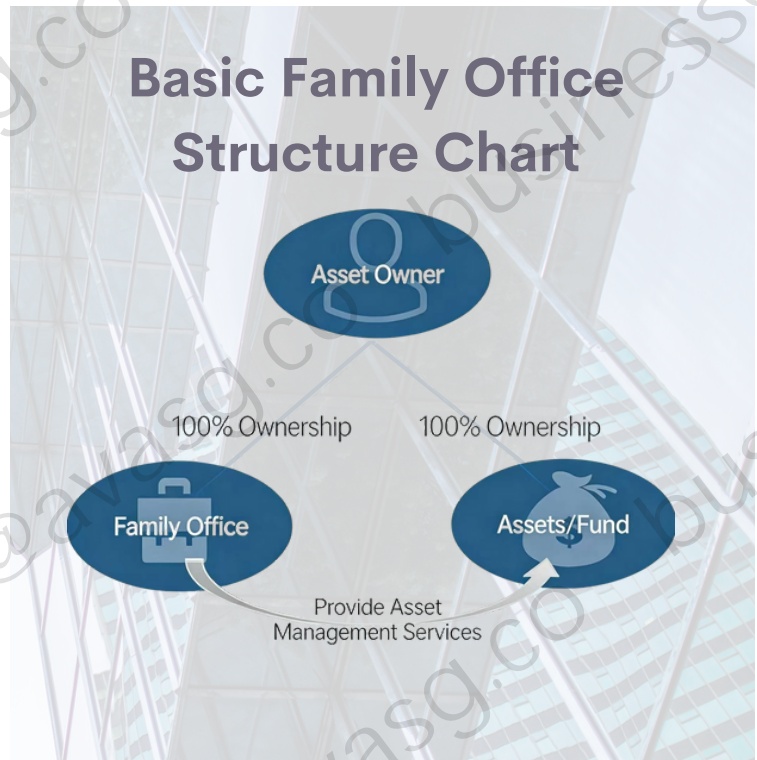
## → PROJECT SCOPE

# DEFINING PROJECT

**Project Overview:** The term "single-family office" is not explicitly defined under Singapore's Securities and Futures Act. Generally, a single-family office refers to an entity that manages the assets of one family and is essentially an asset management entity.

A single-family office that meets specific structural requirements may be exempt from holding a Singapore fund management license, allowing it to employ professionals locally to manage the family's assets. Additionally, under certain conditions, a qualifying single-family office can apply for Singapore fund tax exemption, which exempts specific types of investment income generated by the family office's funds from corporate income tax.

**Eligibility Requirements:** There are no specific entry thresholds for establishing a single-family office itself; requirements mainly pertain to the entity's structure. However, if the family office seeks the fund tax exemption, it must meet the eligibility criteria and conditions outlined in the tax exemption regulations.



### Compliant AM Structure Achieve AM and Allocation

- In-house team manages family wealth, high pertinence
- Family asset management preferences prioritized with high efficiency.
- External asset management fees saved with lower overall management costs.
- Asset management license exemption



### Family Residency Planning Singapore Family Immigration

- Supports EP applications for investment managers
- Permanent residency in Singapore qualifies individuals as Singapore tax residents, entitling them to enjoy ultra-low personal income tax rates.
- Supports Family Pass applications for immediate family members
- Greater advantages for PR applications



### Fund Tax Exemption Tax-Free Investment Income

- Tax Exemption on Investment Fund Income\*
- 13U, 13O, 13D
- Avoidance of Double Taxation

# ABOUT THE FUND TAX EXEMPTION SCHEME

	Offshore Fund Tax Exemption 13D	Onshore Fund Tax Exemption 13O	Enhanced Fund Tax Exemption 13U
<b>Exemption Scope</b>	Income from "designated investments" is exempt. "Designated investments" include stocks, securities, and financial derivatives, but exclude Singapore real estate, digital currencies, and related products.		
<b>Tax Exemption Requirements</b>			
<b>Fund Legal Form</b>	Offshore company, trust, or individual	Singapore company	Any fund structure
<b>Fund Management Company Requirements</b>	Hold a CMS fund management license in Singapore or be exempted	- Hold a CMS license in Singapore or be exempted - at least 2 investment professionals (at least 1 non-family member)	- Hold a CMS license in Singapore or be exempted - at least 3 investment professionals (at least 1 non-family member)
<b>Assets Under Management (AUM) Requirements</b>	No requirement	- Application requires S\$20M invested in designated exempt investments - AUM < S\$100M: at least 10% of AUM must be invested locally - AUM > S\$100M: at least S\$10M invested locally; certain designated investments (e.g., climate-related) can be counted as multiples of investment	- Application requires S\$50M invested in designated exempt investments - AUM < S\$100M: at least 10% of AUM must be invested locally - AUM > S\$100M: at least S\$10M invested locally; certain designated investments (e.g., climate-related) can be counted as multiples of investment
<b>Fund Expenditure</b>	Not limited	- AUM < S\$50M: minimum S\$200K expenditure - S\$50M ≤ AUM ≤ S\$100M: minimum S\$500K expenditure - AUM > S\$100M: minimum S\$1M expenditure - Regardless of AUM, must generate at least S\$200K local business expenditure  - Donations to Singapore charities and grants to blended finance can count as qualifying family office expenditure and may be counted as 2x (e.g., S\$50K donation counts as S\$100K)	- S\$50M ≤ AUM ≤ S\$100M: minimum S\$500K expenditure - AUM > S\$100M: minimum S\$1M expenditure - Must generate at least S\$200K local business expenditure  - Donations to Singapore charities and grants to blended finance can count as qualifying family office expenditure and may be counted as 2x (e.g., S\$50K donation counts as S\$100K)
<b>Government Reporting</b>	Not required	Required; once approved, investment strategy cannot be changed	

→ OUR APPROACH

# SINGLE-FAMILY OFFICE (SFO) SETUP PROCESS



## Architecture Design and Construction

### Step 1: Structure Design & Establishment

Design the family office entity structure based on the client's assets and family plans. Complete entity incorporation, inter-entity shareholding arrangements, and draft necessary agreements.

## AM & Banking Solutions



### Step 2: Asset Management & Banking Solutions

Align with the client's asset types, investment preferences, and strategy. Coordinate with professionals and institutions (e.g., private banks) to optimize the family office's asset management setup.



## License Exemption Fund Tax Exemption

### Step 3: MAS Application Submission

Based on the established structure, apply for the appropriate fund tax exemption policy for the fund's income and assist in preparing all documentation required by MAS.

## EP Application for Investment Managers



### Step 4: Personal & Family Residency Planning

Provide support for employment pass applications for foreign investment professionals within the family office and assist with residency planning based on the client's family needs.

→ PROJECT TIMELINE

# PROJECT TIMELINE (130 AS EXAMPLE)

➤ Week 1-2



- Background assessment and KYC review
- Collect all necessary information and documents

➤ Week 3-4



- Design and establish the family office structure
- Incorporate entities and finalize inter-entity arrangements
- Initiate banking discussions

➤ Week 5-6



- Submit Employment Pass (EP) application
- Submit MAS preliminary questionnaire
- Prepare compliance documentation

➤ Week 7-12



- EP approval
- Open private and corporate bank accounts
- Prepare fund capital injection
- MAS preliminary approval obtained

➤ After Obtaining the EP



- Submit MAS final review
- Expected final review duration: 8-12 months

→ PRICING OPTIONS

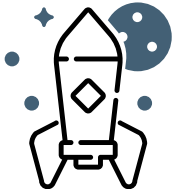
# FEE QUOTATION



Family Office + 13O

**\$49,588**

- ✓ 2\*Singapore company registration with first-year corporate secretarial service and first 6 months local nominee director service (additional fees may apply for complex structures)
- ✓ Singapore corporate operational bank account and private bank account for fund company
- ✓ 1\*Employment Pass application and entry assistance
- ✓ Compliance documentation for fund management license exemption (opinion letter)
- ✓ Drafting of fund management agreement and employment agreements for investment professionals
- ✓ MAS fund tax exemption application (including preliminary and final review)



Family Office + 13U

**\$55,588**

- ✓ 2\*Singapore company registration with first-year corporate secretarial service and first 6 months local nominee director service (additional fees may apply for complex structures)
- ✓ Singapore corporate operational bank account and private bank account for fund company
- ✓ 2\*Employment Pass applications and entry assistance
- ✓ Compliance documentation for fund management license exemption (opinion letter)
- ✓ Drafting of fund management agreement and employment agreements for investment professionals
- ✓ MAS fund tax exemption application (including preliminary and final review)
- ✓ MAS interview guidance (if required)



Family Office + 13D

**\$38,588**

- ✓ 1\*Singapore company registration with first-year corporate secretarial service and first 6 months local nominee director service (additional fees may apply for complex structures)
- ✓ 1\*BVI offshore company registration
- ✓ Singapore corporate operational bank account
- ✓ Offshore fund company investment account setup
- ✓ 1\*Employment Pass application and entry assistance
- ✓ Compliance and tax exemption documentation preparation for fund management license and fund tax exemption (opinion letter)

## → OUR STRENGTH

# WHY CHOOSE US

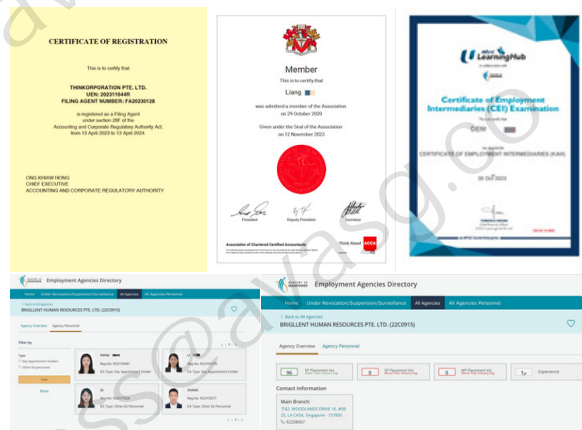


## SG-Rooted | One-Stop Service Hub

AVA delivers integrated, end-to-end solutions for financial institutions, tech companies, global enterprises, and high-net-worth individuals. With deep Singapore market insights and close ties to government agencies and banks, we provide accurate policy guidance and seamless market-entry support.

## Licensed Excellence | Integrated Execution

As a licensed Employment Agency, Filing Agent, and Corporate Service Provider, AVA operates with full regulatory accreditation. Our in-house team covers taxation, accounting, HR, and financial advisory—executing all services directly to ensure quality and confidentiality.



## Client-Centered Service | Fast & Reliable

We offer responsive, personalised support through dedicated account managers. With streamlined workflows and strict quality control, AVA delivers every filing and submission quickly, accurately, and reliably.

7/24 Service Online  
100% Client Satisfaction

## Extensive Success Stories | 99% Approval Rate

Licensed and compliant operations with one-stop professional services. Dual Singapore-China teams with rich local resources. AVA currently manages over 80 single-family offices, leading the industry. In 2022–2025, the family office EP approval rate was 100%, and fund tax exemption approval rate was 100%.



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