

# James Turnbull, LLB.

Tyršova 654/4  
274 01 Slaný, Czech Republic

+420 604 891 330  
[james@uplift.cz](mailto:james@uplift.cz)

---

## Professional Experience

### Svěřenské fondy a trusty s.r.o. (Prague, Czech Republic)

[www.trusty.cz](http://www.trusty.cz)

#### CEO (2013 – date)

Svěřenské fondy a trusty is the Czech Republic's first professional trust administrator. I drove the establishment of this start-up business in order to capitalise on an opportunity created by the new Czech civil code. This business is now successfully up and running and, as a result, the time input required from me is reducing, which means I am now available for other projects. I remain as a shareholder and plan to continue to devote 1-2 days a week to oversee the development of this exciting new business.

Key achievements in this role have included:

- Formulating the business concept and developing a viable business plan
- Promoting the concept to external investors, successfully achieving significant capital funding which enabled the business to launch in summer 2014.
- Establishing the business from 'the ground up' including;
  - establishing and setting up an office in central Prague,
  - developing business and marketing strategies and policies,
  - branding and corporate imaging,
  - recruiting and training staff,
  - developing documentation and procedural templates in compliance with international best practice,
  - preparing marketing materials and presentations,
  - development of, communication and relationship building with a network of Czech lawyers and other intermediaries,
  - sales and team management,
  - tight cost control and driving revenue flows which should take the business into profitability in second half of 2015.
- Driving the formation and launch of Asociace pro podporu a rozvoj svěřenských fondů, z.s.

### Uplift.cz (Slany, Czech Republic)

[www.uplift.cz](http://www.uplift.cz)

#### Director (2004 – date)

Following a career break spent travelling internationally, I established Uplift in the Czech Republic. Uplift is a private consultancy business which is also the European agent for New Zealand Trustee Services Limited. In this role I worked closely with private bankers and other advisers throughout continental Europe providing them with access to New Zealand-based asset structuring solutions. This included;

- Direct communication and relationship building with private bankers and other potential intermediaries
- Direct liaison with HNW clients
- Preparing marketing materials
- Writing articles for *Offshore Investment* magazine and other similar publications
- Maintaining a good understanding of NZ Trust legislation as well as EU Savings Tax Directives and OECD Common Reporting Standards
- Working with asset managers to assist them to structure funds in a legally compliant and cost effective way

In addition, during this period I provided business communication and technical training for senior

executives in local and international companies.

Since 2013 this business has largely gone into abeyance, as I have been focusing my energies on Svěřenské fondy a trusty s.r.o.

## **ILSC Limited (Auckland, New Zealand)**

[www.investmentlink.co.nz](http://www.investmentlink.co.nz)

### **Non-Executive Director (1999 – 2002)**

This company managed an industry-wide data standard and implemented a platform to enable financial advisers to access their clients' data.

## **Macquarie Investment Services (Auckland, New Zealand)**

[www.macquarie.co.nz](http://www.macquarie.co.nz)

### **Associate Director & Head of New Zealand (1998 – 2002)**

#### **Business Development Manager (1998)**

This position involved total responsibility for this Australian bank's New Zealand investment management business. This initially comprised a cash management trust and the marketing of an Australian product range in the New Zealand market.

This role was similar to my previous position at Countrywide Bank (see below). Selected achievements and additional responsibilities included:

- Grew funds under management from \$ 20 million to \$ 330 million.
- Increased NZ Cash Trust market ranking from 11th to 1st place (out of 16).
- Achieved sector dominance. We estimated that we were achieving in excess of 90% of all new cash trust inflows.
- Launched and marketed New Zealand's most successful closed end hedge fund product - the Titan Trust, which attracted \$ 70 million in a two-month offering period.
- Built strong relationships with senior management of financial planning and stockbroking businesses.
- Managed a business development, marketing and administration team.
- Served as a non-executive director of ILSC Limited . This company managed an industry wide data standard and implemented a platform to enable financial advisers to access their clients' data.

## **Countrywide Funds Management (Auckland, New Zealand)**

### **New Zealand Manager (1992 – 1998)**

This position involved total responsibility for all aspects of Countrywide Bank's managed funds products and financial advisory services and reported to the CFML board.

Key responsibilities and achievements included:

- Grew funds under management from \$ 15 million to \$ 115 million.
- Moved the company into profitability.
- Developed and delivered managed funds training to the bank's branch network.
- Repositioned managed funds products in the branch network. This resulted in New Zealand's top per branch sales results.
- Introduced managed funds products to the United Bank branch network following acquisition by Countrywide.
- Developed and launched three investment products including the award winning Countrywide Bank Sharemarket Bond.
- Restructured the Countrywide Global Trust which greatly improved competitiveness and performance.
- Prepared and rolled over all prospectuses and other statutory requirements.
- Managed Investor communication, including brochures, performance updates, and newsletters.
- Managed an administration team and a highly successful nation-wide team of investment sales consultants.

- Was responsible for all aspects of investment management.
- Strategic planning, including development of strategic and business plans for CFM together with involvement in CB's strategic planning process.
- Involved with identification and investigation of potential acquisitions.

### **Investment Services Executive (1989 – 1992)**

In addition to providing clients with investment advice I also:

- Implemented a computerised Portfolio Monitoring System.
- Marketed the services of Countrywide Investments both internally to the branch network and to customers.
- Marketed Countrywide's Managed Funds to the branch network and to independent financial advisers and stockbrokers.
- Consistently achieved or exceeded targets.

### **Guildford Group Limited (Wellington, New Zealand)**

Employed 1988-1989 as an Investment Consultant. Responsible for developing and servicing an investment advisory client base. Left this job due to the closure of the Wellington office.

### **Phillips Shayle-George (Now DLA Piper New Zealand)**

Employed 1985-1987 as a staff solicitor working in the Estates department. Resigned to move into the financial services industry.

## **Community Involvement**

I am also:

- President of **CANZA** - the Czech Australia New Zealand Association [www.canza.org](http://www.canza.org)
- A board member of the **Asociace pro podporu a rozvoj svěřenských fondů z.s.** [www.aprsf.cz](http://www.aprsf.cz)
- A member of the APRSF legislative committee.
- I am currently active in the Czech launch of **Australian Business in Europe.** [www.abie.com.au](http://www.abie.com.au)

<b>DATE OF BIRTH:</b>	20 December 1962
<b>PLACE OF BIRTH:</b>	Wellington, New Zealand
<b>EDUCATION:</b>	LLB. (Law Degree) Canterbury University 1985 Christ's College, New Zealand Island School, Hong Kong
<b>LANGUAGES:</b>	English (Native Speaker), Czech (Intermediate)
<b>NATIONALITY:</b>	New Zealander with Czech Permanent Residence.
<b>MARITAL STATUS:</b>	Married, with two children
<b>INTERESTS AND HOBBIES:</b>	In-line skating, Cross-country skiing, Hiking