

## International Succession Planning Using Malta Structures

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By **Abigail Aquilina**, 19th May 2026

Modern family wealth is increasingly international. Entrepreneurs, investors, and high-net-worth families often hold assets across multiple jurisdictions, while family members may reside in different countries. Without careful planning, these situations can lead to conflicts relating to forced inheritance laws, tax inefficiencies, and administrative fragmentation across jurisdictions.

Succession planning is not just a legal exercise, but a strategic process aimed at preserving family wealth and ensuring continuity across generations. In such situations the most critical aspect is selecting the appropriate jurisdiction.

Malta continues to position itself as a highly attractive jurisdiction in this context, combining the legal certainty of an EU Member State with flexible wealth structuring solutions. International families are drawn to Malta due to its familiarity with both civil and common law, security, political stability and extensive network of Double Taxation Agreements (DTAs).

### **Succession Planning Structures in Malta**

Malta provides a range of established vehicles that can be tailored to the specific needs of each family.

#### **Maltese Trusts**

Maltese Trusts remain one of the most widely used tools, as the settlor may retain certain reserved powers, which can be particularly valuable where the next generation is not yet prepared to assume responsibility for managing substantial wealth.

In many international structures, Maltese Trusts may offer fiscal neutrality, while providing a clear separation between legal and effective ownership. These structures are especially suitable for families seeking long-term asset protection, controlled

mechanisms, and flexibility in the management of wealth.

### **Maltese Foundations**

For families more familiar with civil law systems, Maltese foundations often present an attractive alternative. Unlike trusts, Maltese foundations possess their own separate legal personality, while still allowing founders a degree of visibility and control, alongside clear governance set out in their statutes.

### **Hybrid Structures**

In practice, many international families opt for hybrid structures that combine several Maltese vehicles into a single framework.

Examples may include:

- A Maltese Foundation acting as the central governance vehicle while owning a holding company.
- A Maltese Trust holding investment assets alongside a family governance structure.

Combinations of Maltese companies, foundations, and trusts are designed to address succession, tax coordination, and asset protection simultaneously.

### **A Practical Example**

Consider an Italian entrepreneur with children residing in the United Kingdom and owns investment assets in the UAE.

In such scenario, a Maltese foundation can act as a central governance vehicle, while a Maltese holding company may consolidate ownership of the investment portfolio. The foundation statutes could establish clear rules regarding governance, succession and distributions to future beneficiaries.

With such structures, it becomes fundamental to seek legal and tax advice in all jurisdictions concerned, to ensure alignment and any tax considerations.

### **How Dixcart Malta Can Assist**

Staying up to date with legislative changes, international tax standards, and evolving succession rules is essential to ensure that wealth structures remain effective over time.

Today's families are becoming increasingly complex, with interest and family members located in multiple jurisdictions. The succession planning structures need careful coordination across borders and a joined-up approach.

This is where the Dixcart Group could support you. With offices in seven countries, we are well positioned to help you navigate international considerations and bring clarity to complex structures.

Dixcart provides practical, commercially focused advice tailored to the specific circumstances of each client and family. We work alongside your existing advisors where required to ensure everything is aligned. From initial structuring through to ongoing management, we help you build solutions that are both robust and sustainable.

For further information or to arrange a personalised and confidential assessment, please contact [our team](#) at [advice.malta@dixcart.com](mailto:advice.malta@dixcart.com).