



www.switzerland-family-office.com/services.html

Family Office Services

A professional family office can provide its clients with a broad range of different services. On this page you will find a list of family office services that can potentially be offered by a family office (in Switzerland).

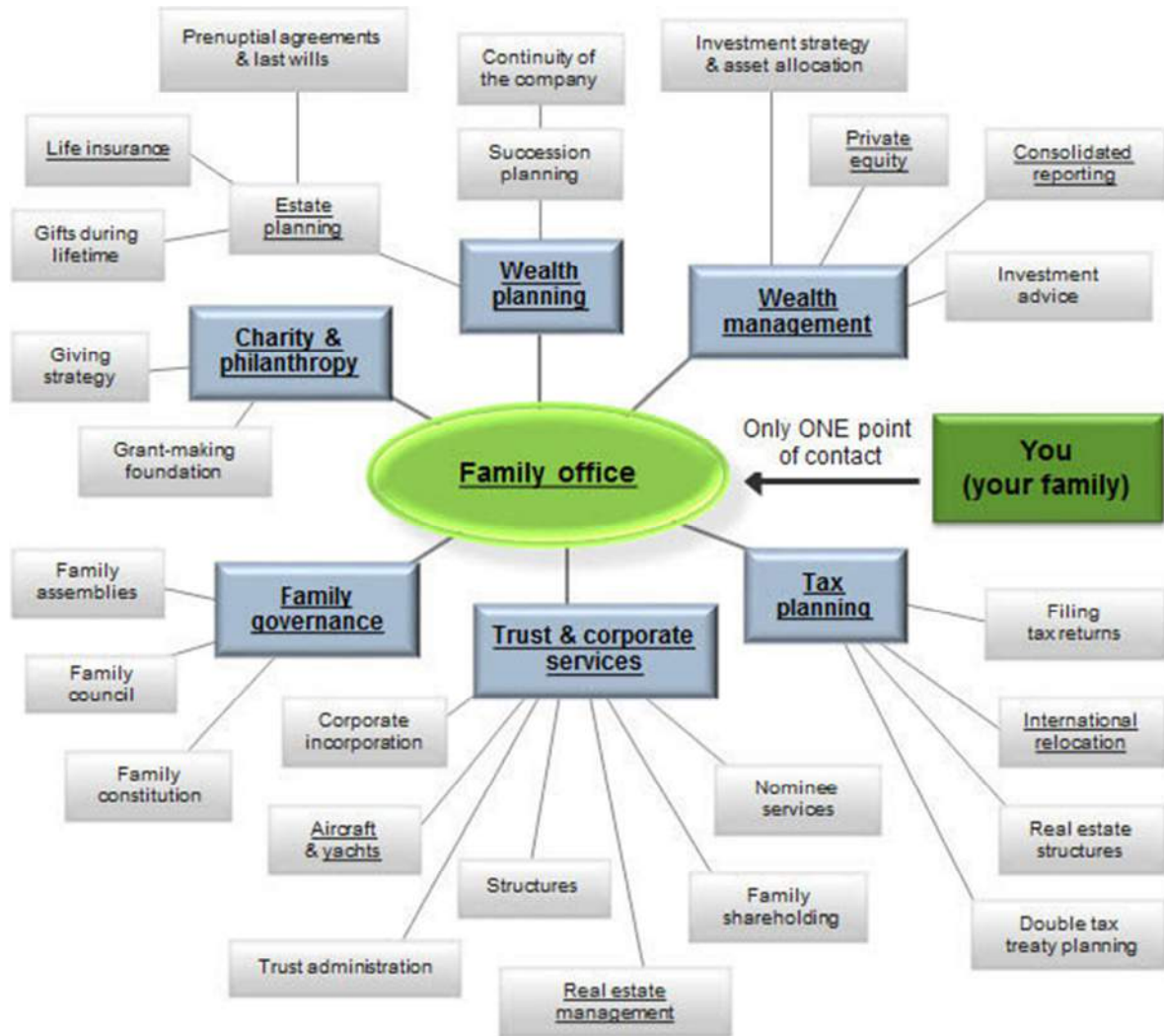
Does every family office offer the same services?

Besides its independence two of the services a family office primarily provides are asset management and (consolidated) reporting of all the family's assets. Often a basic family office will only offer asset management. Such a family office is actually more an independent asset manager. A genuine multi-family office offers a broad range of services. Other services it provides include wealth and tax planning, trustee and corporate services, and support with real estate and family governance. There is also a type of family office that will not only support you on the financial side, but also with more administrative and personal issues, acting for example as a private secretary, making travel arrangements, or guiding your children. These kinds of services are also known as 'lifestyle management'.

Which services do you actually need?

The chance of you finding the most suitable multi-family office in Switzerland by yourself, is fairly limited. It is therefore important first to analyse in advance which services you will need from a family office, and to check which services they are really able to provide. It is also important to check whether the family office offers those services to you in-house or via external advisors, since it could have a considerable influence on the costs.

We look forward to helping you find the family office services you need.



Asset Management / Investment Services

- ◆ Diagnosis of your overall financial situation
- ◆ Defining the family's investment objectives
- ◆ Establishing risk profile and investment horizon
- ◆ Global asset allocation and investment strategy
- ◆ Evaluating non-registered securities
- ◆ Administering and advising on banking relationships
- ◆ Opening bank accounts on behalf of the family
- ◆ Discretionary and non-discretionary mandates

Monitoring and Reporting Services

- ◆ Consolidated reporting of global bank accounts
- ◆ Consolidation and reporting of all family assets (including non-bankable assets)
- ◆ Consolidated performance reporting
- ◆ Risk-adjusted performance reporting and risk attribution
- ◆ Benchmark comparison
- ◆ Fiscal annual performance
- ◆ Risk reporting
- ◆ Offering an online reporting system

Family Governance Services

- ◆ Support in putting family governance into place
- ◆ Arrangements for succession within the family company
- ◆ Support with legacy protection
- ◆ Set-up of family constitution
- ◆ Organising family retreats and family assemblies
- ◆ Supporting family council meetings
- ◆ Mentoring family members
- ◆ Individual education according to family members needs

Wealth Planning Services

- ◆ Structuring assets and investments to aid tax planning
- ◆ Advice on ownership, management and distribution of assets
- ◆ Privacy and wealth protection structures

Taxes / International Tax Planning Services

- ◆ Double-tax treaty planning for family-owned companies and real estate
- ◆ Local and international tax advice
- ◆ Fiscal company migration
- ◆ Preparation of tax returns (incl. country of residence)
- ◆ Swiss tax advice

Trustee and Corporate Services

- ◆ Advice on issues of company incorporation and management in various jurisdictions



- ◆ Managing family shareholdings
- ◆ Selecting appropriate jurisdictions for trusts, foundations and other (corporate) structures
- ◆ Setting up, administering and coordinating trusts, foundations and other (corporate) structures
- ◆ Coordinating contacts with various local and foreign authorities
- ◆ Selecting independent trustees and protectors
- ◆ Controlling costs of external trust providers
- ◆ Providing registered office facilities
- ◆ Providing nominee services

Charity & Philanthropy Services

- ◆ Philanthropic planning
- ◆ Assistance and guidance in the establishment and administration of charitable foundations
- ◆ Support in formulating a donor's giving strategy
- ◆ Technical advice on and operational management of charities
- ◆ Establishing grant-making foundations and trusts
- ◆ Preparing and presenting philanthropic initiatives
- ◆ Organising fund-raisers
- ◆ Operating your own charitable structure (by the family office) for clients to participate in

International Relocation Services

- ◆ Analysing tax and other benefits of international relocation
- ◆ Support with change of domicile
- ◆ Support with obtaining international residence permits
- ◆ Assistance in locating and applying to foreign schools
- ◆ Coordinating contacts with all authorities involved (federal, cantonal and municipal)
- ◆ Support with Lump-sum negotiations in Switzerland

Real Estate Services

- ◆ Real estate advisory
- ◆ Bespoke property search
- ◆ Access to off-market luxury properties
- ◆ Creating a property portfolio

- ◆ Administrative property acquisition support
- ◆ Support with sale of real estate
- ◆ (International) real estate management
- ◆ Organising security protection of private residences
- ◆ Real estate financing/mortgages

Aircraft, Yachts, Art, Horses, etc.

- ◆ Support with acquisition and sale of yachts, aircraft, (classic) cars, horses and other valuables
- ◆ Aircraft and yacht financing (read about: Running a Superyacht)
- ◆ Refinancing aircraft, yachts and reviewing existing arrangements
- ◆ Setting up tax-efficient structures for yachts, aircraft, art and the like
- ◆ Providing digital images and condition reports of artwork in an online system
- ◆ Recording insurance details of assets
- ◆ Organising restoration and storage of art

Business Development / Investment Banking / Private Equity Services

- ◆ Merger & Acquisition advisory
- ◆ Support with Initial Public Offerings (IPO)
- ◆ Structured finance
- ◆ Partner matching
- ◆ Support with raising equity finance
- ◆ Private equity investments and structures

Insurance Services

- ◆ Evaluating a portfolio of insurances and implementing new insurance policies
- ◆ Renegotiating and amending existing policies
- ◆ Support with life insurance as a wealth planning tool
- ◆ Organising international health insurance
- ◆ Support with kidnap & ransom insurance
- ◆ International personal liability insurance
- ◆ Insurance related to special assets, e.g. aircraft, yachts, art and the like

Estate Planning Services

- ◆ Support with estate planning
- ◆ Support with drafting testaments/last wills



- ◆ Marital contract planning
- ◆ Support with prenuptial agreements
- ◆ Retirement planning
- ◆ Executorships

Budget & Cash Flow Management Services

- ◆ Assessing actual wealth and current income, diagnosis of short- and medium-term liquidity requirements and long-term goals
- ◆ Cash-flow projections
- ◆ Private accounting
- ◆ Cash management (bill paying, cash flow, budgeting, etc)

Administrative Services

- ◆ Support with general legal issues
- ◆ Document & record management
- ◆ Accounting
- ◆ Book-keeping
- ◆ Collecting and filing administrative documents
- ◆ Paying invoices and taxes, and arranging tax compliance

Family / General Support

- ◆ Travel arrangements
- ◆ Private secretary services
- ◆ Concierge services
- ◆ Hiring domestic staff (nannies, chefs, chauffeurs, private tutors and other household staff)
- ◆ Managing household employees
- ◆ Organising private events (weddings, celebrations, birthday parties, etc.)
- ◆ Support with schooling for your children
- ◆ Purchasing, insuring and shipping assets

Miscellaneous

- ◆ Access to an international network of peer families, to provide opportunities for co-investment and best-practice sharing
- ◆ Support in setting up a single-family office