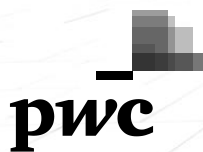


International Tax

# *Private Wealth & Entrepreneurs*

Custom made international  
expertise





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## *Structuring your assets*

*Structuring your personal and business assets is a complex matter which, because of the numerous tax and legal regulations involved, calls for expert advice and the support of a competent team.*

### **Personal or business assets – sustainable structuring is vital**

- We can advise and support you in the planning and implementation of national- and international structures for private assets such as real estate, jewellery and artworks, yachts and aircraft.
- We can advise and support you in the planning and implementation of national- and international structures for business assets such as holding structures, trading, manufacturing and service companies, or private equity investments.
- We can develop an optimal and sustainable tax strategy to meet your family and business needs.
- We can advise you on the prevention and resolution of legal and tax issues, and represent you before the tax authorities and fiscal courts.



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## *Asset protection*

*Asset protection aims to safeguard your assets from potential loss through third-party actions. Though such risks usually arise in the context of commercial and financial activities, divorce and inheritance issues can often pose similar threats to your wealth. Not every hazard can be predicted and averted, but many can be mitigated by careful planning and preparation.*

### **Protect your assets**

- We advise and support you in the planning and implementation of classic asset protection structures such as trusts and foundations.
- We show you how to separate your private and business assets to increase your protection and reduce your exposure to risk.
- We help you optimise your choice of business structures to minimise your risks.
- We help you to draft appropriate matrimonial and inheritance agreements.



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## *Succession planning*

*Whatever succession strategy you choose, it is important to set the right course early on. The needs of the business, the entrepreneur, the successor and the family must all be acknowledged and taken into account. In addition, company-related factors such as the legal aspects of taxation, inheritance and pension must also be considered.*

### **Timely succession planning**

- We support you with a careful assessment of possible succession strategies which shall consider economic and tax perspectives, as well as the financial, legal and family circumstances.
- We work in close collaboration with you to develop an optimal succession plan for you and your business.
- We advise you on the implementation of your chosen succession strategy and guide you through the implementation.



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## *Estate planning*

*Especially where large estates and businesses are concerned, the impact of an unexpected loss of decision-making capacity, or a death, should be taken into consideration.*

### **Timely estate planning**

- We arrange individual workshops to analyse your needs and goals.
- We create an actual vs. target comparison and a risk vs. reward analysis for your current situation based on which we elaborate possible alternative solutions as well as an action plan for implementation.



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## *Your after-tax yield*

*Nowadays taxes are a significant cost factor. Thus it is advisable to analyse not just the anticipated gross margin of your portfolio yield but also your actual net return after tax.*

### **Your tax burden – a comprehensive analysis is important**

- We analyse your current portfolio in terms of risk, tax-liability and compliance.
- Based on this analysis and your personal needs, we establish key criteria defining your individual investment strategy together with you.
- Our recommendations will incorporate the latest tax and regulatory developments.





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## *Family und corporate governance*

*Aligning family and business interests is a challenging task because emotions have to be linked to business realities. We advise family businesses on the development and implementation of family strategies and resulting control- and conflict-resolution mechanisms. This will help to strengthen privately owned family business and bring long-term benefits.*

### **Balancing family and corporate interests**

- We arrange individual seminars where we work with you to identify short, medium and long-term interests for your family and business.
- We help you to develop governance concepts and guidelines for your family business.
- We advise you on the definition of owners' rights and obligations.
- We help you to introduce family- and corporate-governance structures and support you with their implementation.
- We illustrate and share examples of family business experiences, both nationally and internationally.



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## *Families and entrepreneurs worldwide*

*Families and entrepreneurs often maintain a concurrent presence in several different countries – a situation which can arise through the residential status of family members, the choice of business location, or the private ownership of assets and real estate. Through our network of local specialists we not only offer sustainable cross-border planning but also provide rapid, on-the-spot assistance if an individual or business should encounter an urgent issue.*

### **Cross-border coordination and planning**

- We advise and assist you with your relocation.
- We provide advice and support in international pension and social security matters.
- We advise and assist in international estate-duty and inheritance matters.
- We provide advice on cross-border business issues such as developing new business locations as well as supporting you with business acquisitions and relocations.



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# Compliance

*To avoid undermining the long-term security of your assets, it is essential to meet the corresponding compliance requirements. PwC offers wealthy private clients, families and entrepreneurs comprehensive compliance-assistance in national and international matters.*

## **Tax risk management**

- We undertake and coordinate your tax, social security and legal compliance work in the territories concerned.
- We manage your deadlines and your liquidity planning in tax-related aspects.
- We inform you of current trends, developments and regulatory changes.



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## *Custom made international expertise*

*Proper tax advice is a vital component of company success.*

PwC has a long tradition of advising Swiss and international private clients, whether they are entrepreneurs, executives or individuals and families with complex wealth and asset situation.

We listen to your needs, offer our experience and work with you using our network of national and international specialists to develop custom made solutions.



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# *Notes*

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# *Private Wealth & Entrepreneurs – Our Team*

## Co-Leader German-speaking Switzerland



**Dr. Marcel Widrig**

Partner

+41 58 792 4450

marcel.widrig@ch.pwc.com

## Co-Leader German-speaking Switzerland



**Matthias Schweighauser**

Partner

+41 58 792 5407

matthias.schweighauser@ch.pwc.com

## Leader French-speaking Switzerland



**Claude-Alain Barke**

Partner

+41 58 792 8317

claude-alain.barke@ch.pwc.com

## Leader Italian-speaking Switzerland



**Louis Macchi**

Partner

+41 58 792 6516

louis.macchi@ch.pwc.com

Meet the Team:

<http://www.pwc.ch/en/services/private-wealth/standorte.html>

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