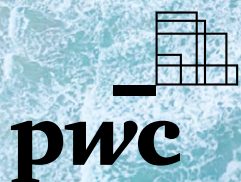


Private Wealth and Entrepreneurs

International expertise addressing individual needs



www.pwc.ch/private-wealth



Contents

01 Asset structuring

.....

02 Asset protection

.....

03 Succession planning

.....

04 Estate planning

.....

05 Family offices

.....

06 Global families and entrepreneurs

.....

01



Asset structuring

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.

For personal and business assets alike – the right structure is critical

- We advise and support you in the planning and implementation of national and international structures for your private assets, such as real estate, jewellery, artworks, yachts and aircraft.
- We advise you in the planning process and help you to implement national and international structures for your business assets, such as holding structures, trading, manufacturing and service companies, and private equity investments.
- We develop an optimised, long-term tax strategy for your family and your business.
- We advise you on the prevention and resolution of legal and tax risks and represent you before the tax authorities and tax courts.

02

Asset protection



Asset protection seeks to safeguard your assets from potential loss through third-party actions. In particular, threats to your assets often arise from commercial or financial activity or in connection with divorce or inheritances. Not all such threats can be predicted or prevented, but many can be headed off 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 you can separate your business and personal assets thereby protecting them against risks.
- We advise you on selecting a risk-limited structure for your entrepreneurial activities.
- We help you to draft nuptial and inheritance agreements.

03

Succession planning



Depending on your chosen succession arrangement, you may need to set the wheels in motion well ahead of time. The needs of the business, the entrepreneur, the successor and the family must all be considered. Alongside the factors relevant for the business, you also need to take into account tax, inheritance and pension matters.

Plan your succession in good time

- We support you in taking stock of where you are with a view to potential succession strategies, including the economic and tax aspects, and also your financial, legal and family circumstances.
- We work very closely with you to devise the optimal succession arrangement for you and your business.
- We advise you on implementing this solution once developed and support you through all the ensuing tasks.

04



Estate planning

Especially where large estates and entrepreneurs are involved, the impact of unexpected incapacity or death must not be underestimated.

Timely estate planning

- We analyse your objectives and needs in a solo workshop.
- We produce a an actual vs. target comparison and conduct a risk/benefit analysis in light of the status quo, flag up where there is a need for action and suggest possible alternatives.
- We support you in implementing the chosen solution.

05

Family offices



Bringing family interests into line with those of the business is a tough job, as it involves reconciling emotions and facts. We advise family businesses on developing and implementing family strategies and the associated control and conflict resolution mechanisms. In this way, the strengths of a privately held family business with a focus on the long term can truly come to the fore.

Protecting and growing your family's assets

- Family assets are protected by ensuring they are optimally structured from a legal and regulatory angle.
- Communication between family members is improved, enabling important issues – from the business's values and purpose right through to critical investment decisions – to be discussed within the family.
- Coherent governance for the management of family assets is assured by defining suitable processes for the management of the assets.
- Family members are relieved of administrative duties through personalised financial management and protection of privacy.

06

Global families and entrepreneurs



Global families and businesses have a presence in multiple countries at once, either because of where family members or their businesses are domiciled or via privately held assets such as real estate. Thanks to our network of local specialists, we are not only able to assist with sustainable cross-border planning but can also leap into action if an urgent issue needs resolving, whether that relates to an individual or the business.

Cross-border planning and coordination

- We provide advice and support on relocation.
- We provide advice and support on international social security and pension matters.
- We provide advice and support on international estate-duty and inheritance tax matters.
- We provide advice and support on cross-border business matters, such as the establishment of new locations, offshoring and acquisitions.

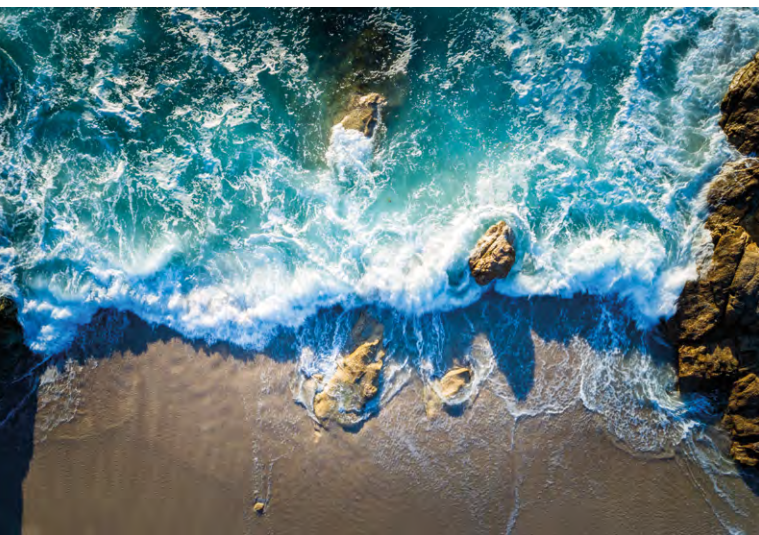


International expertise addressing individual needs

Getting the right tax advice is critical to a business's success.

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

We listen to you, share our experience and work with you to develop bespoke solutions. Our outstanding, firmly established network of national and international specialists are on hand to support you too.



Private Wealth and Entrepreneurs – our team



Lisa Cornwell

Partner, Leader Private Clients and Family Offices,
PwC Switzerland

+41 58 792 25 93

lisa.cornwell.webb@pwc.ch



Pascal Dewarrat

Partner, Private Clients and Family Offices Romandie,
PwC Switzerland

+41 58 792 83 75

pascal.dewarrat@pwc.ch



Kornel Wick

Managing Director, Private Clients –
Executive Advisory, PwC Switzerland

+41 58 792 42 48

kornel.wick@pwc.ch



Dimitar Kanev

Senior Manager, Private Clients and Family Offices –
USA, PwC Switzerland

+41 58 792 45 68

dimitar.kanev@pwc.ch



Anna Stepuk

Senior Manager, Private Clients and Family Offices –
Emerging markets, PwC Switzerland

+41 58 792 48 60

anna.stepuk@pwc.ch



Kerem Yüktasir

Senior Manager, Private Clients and Family Offices –
Turkey, PwC Switzerland

+41 79 264 52 18

kerem.yuektasir@pwc.ch



Cagla Arslan

Senior Manager, Private clients –
Executive Advisory, PwC Switzerland

+41 58 792 29 04

cagla.arslan@pwc.ch



Alessia Randazzo

Manager, Private clients – Immigration,
PwC Switzerland

+41 58 792 18 41

alessia.a.randazzo@pwc.ch

More information on
www.pwc.ch/private-wealth

