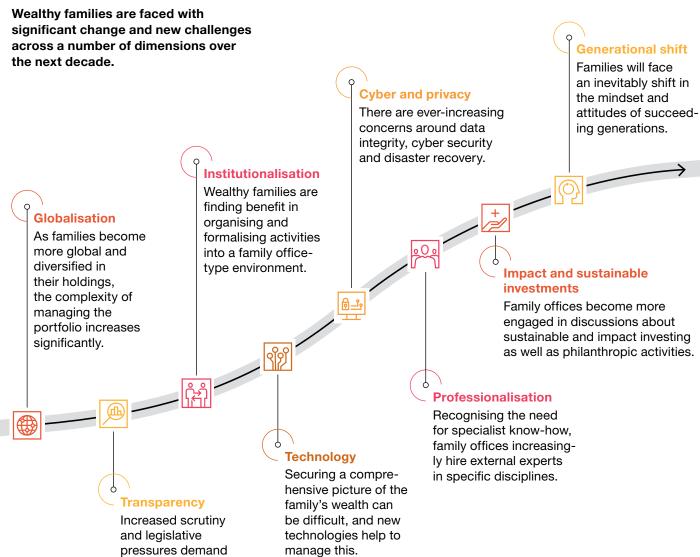


Your family's vision is the foundation of your family office.







greater transparency of wealth structures.

What do you currently have in mind?

Are you a family member or a major stakeholder of a family office, or are you entrusted with the administration of assets of a family or individual in a family office?

## How we can support you

At PwC, we understand that there is no one-size-fits-all solution for our clients' family office requirements, and that the design and function of a family office is based on the vision of the individuals that it represents.

Our multi-disciplined and international team therefore provides holistic and independent advice based on professional expertise and personal integrity. PwC's dedicated family office team helps you design, set up, assess and optimise your family office structure to achieve your goals now and for future generations.

What type of family office is right for our family?"

How to proceed if we intend to relocate our family and wealth structure to Switzerland?"

How to pass a large sum of money to my spouse or children in the most tax-efficient manner?"

Can we optimise the annual tax returns?"

What should be considered if planning to outsource certain services?"

How can I optimise the real-estate portfolio?"

What needs to be included in a family office business plan and what are the different stages involved in setting up a family office?"

What are other families doing?"

#### Continuity planning

- Succession planning: Ownership and Leadership
- Testament and emergency plan
- Next Gen development/ education

set up

#### Structuring

- Design and implementation of Family Office structure
- Review of operating model
- Regulatory and compliance

PwC helps to

#### **Family Governance**

- Family education
- Family management
- Conflict management
- Family constitution

optimise

#### **Wealth Planning**

- Generational transition
- Transfer of shares
- Philanthropic advice
- Luxury assets
- Real Estate advice

### Owner

Family member Family Office

Management

Third party (lawyer, bank etc.)

assess

#### ESG and sustainability

- Sustainable KPI's
- Incorporation of ESG
- Green financial instruments
- Green funds and impact investment
- Sustainable reporting

#### **Operational support**

- Incentive plans for employees
- Resilience and cyber security
- Accounting
- Financial statement audits
- Annual tax returns

#### a lay cotmont or

- Valuation
- Investment opportunities
- Due diligence
- Advice on regulations and compliance

**Asset Management** 

- Licensing
- M&A

#### **Tax and Compliance**

- Swiss and international tax planning
- Corporate structuring
- Personal tax compliance
- Financial planning
- Trust management
- VAT compliance

#### Legal

- Swiss (and international) legal advice on corporate structure
- Real-estate advisory
- Relocation and immigration
- Inheritance law
- Licensing
- Negotiation with finan--cial institutions

# Bring your family office vision to life.

Wealth is volatile and it needs to be nurtured with care and strong values.

How families manage their affairs and control their wealth is changing. Increasing complexity, more public scrutiny and new regulations are just some of the reasons why many families are finding great benefit in using family offices to help them build legacy.

A family office can help to...

- protect the family's privacy,
- simplify the administrative burden,
- oversee family assets and enterprises,
- pool resources for investments,
- manage risks facing the family, and
- provide continuity across generations.

Since every family has its own unique set of needs, there are as many types of family offices as there are families. Some provide basic administrative support while others offer broader services that encompass asset management, managing risk and wider governance.

By focusing on what is unique to your family, we establish priorities, develop long-term strategies and use our expertise in all areas of reporting, tax and consulting to help you make your company and family office resilient.

...a focus on ...with a robust family values and governance aspirations... framework. With PwC you will get... ...a multi-disciplined team ...leading to practical and providing depth of expertise, holistic and tailored solutions. independent advice...

#### Get in contact with us

We provide you with certainty and peace of mind with regard to your family office affairs by understanding your vision for the future and providing you with the right expert.



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