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

Our guide to family office services



www.pwc.ch/family-office-en

Bring your family office vision to life

Helping you to seize opportunities, managed risks, make a positive impact and protect your family legacy.

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.

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.

A **family office** can help to:

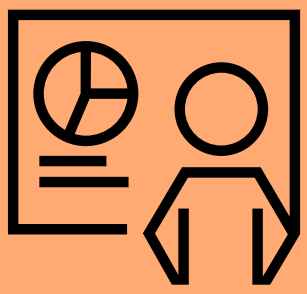
- protect the family's privacy,
- simplify the administrative burden,
- oversee family assets and enterprises,
- pool resources for investments,
- manage risks facing the family, and
- provide continuity across generations.



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.

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?



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?

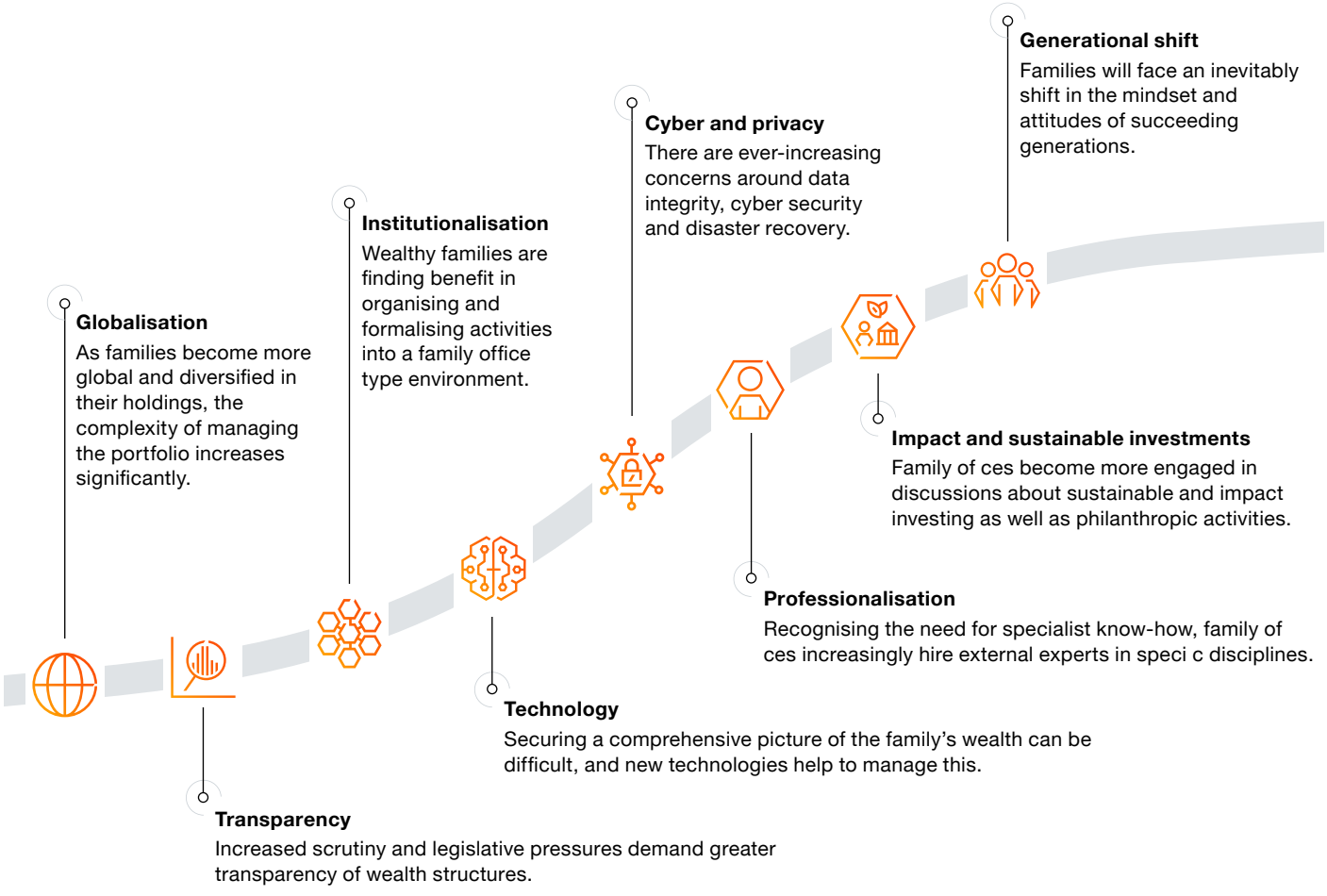
How can I optimise the real-estate portfolio?

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?

What we are seeing today

Wealthy families are faced with significant change and new challenges across a number of dimensions over the next decade.



How we can support you

At PwC, we understand that there is no one-size-fits-all solution for our clients' family office requirements.

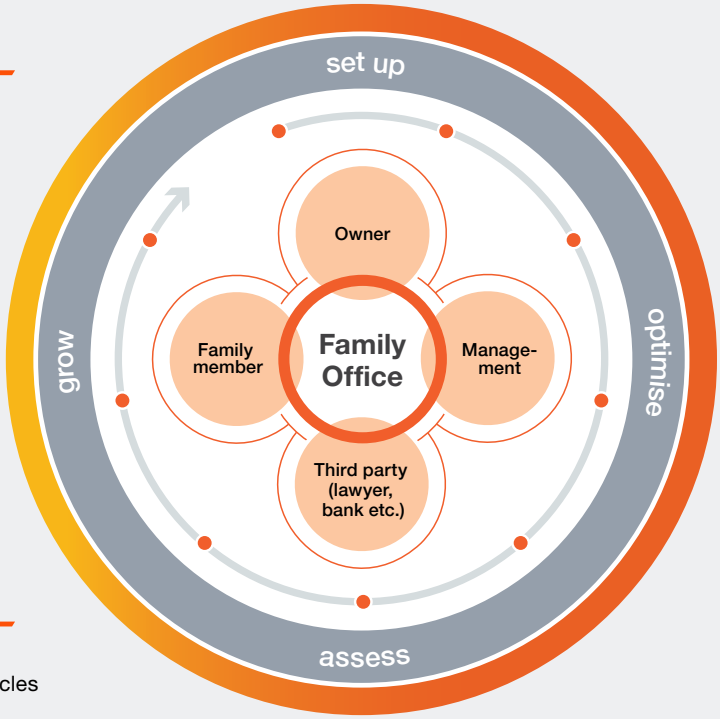
The design and function of a family office is based on the vision of the individuals that it represents. Our multi-disciplined and international team therefore provides holistic and independent advice based on professional expertise and personal integrity.

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.

Structuring
- Structure review and optimisation
- Select optimal family office structure
- Design tailored family office solutions
- Deliver end-to-end implementation support

Continuity planning
- Succession planning
- Support with generational transfers
- Ownership and Leadership coaching
- Emergency and Back-up Planning
- Next Gen development / education

Family Governance
- Succession planning
- Governance framework design
- Family education
- Conflict mediation



Philanthropy and private foundations
- Assess best vehicle for family to achieve their philanthropic goals
- Vehicle setup (legal, governance, tax-exempt status)
- Operating model, governance, accountability and risk frameworks
- Due diligence and capacity assessments of global partners
- Monitoring, evaluation, learning, impact measurement and reporting

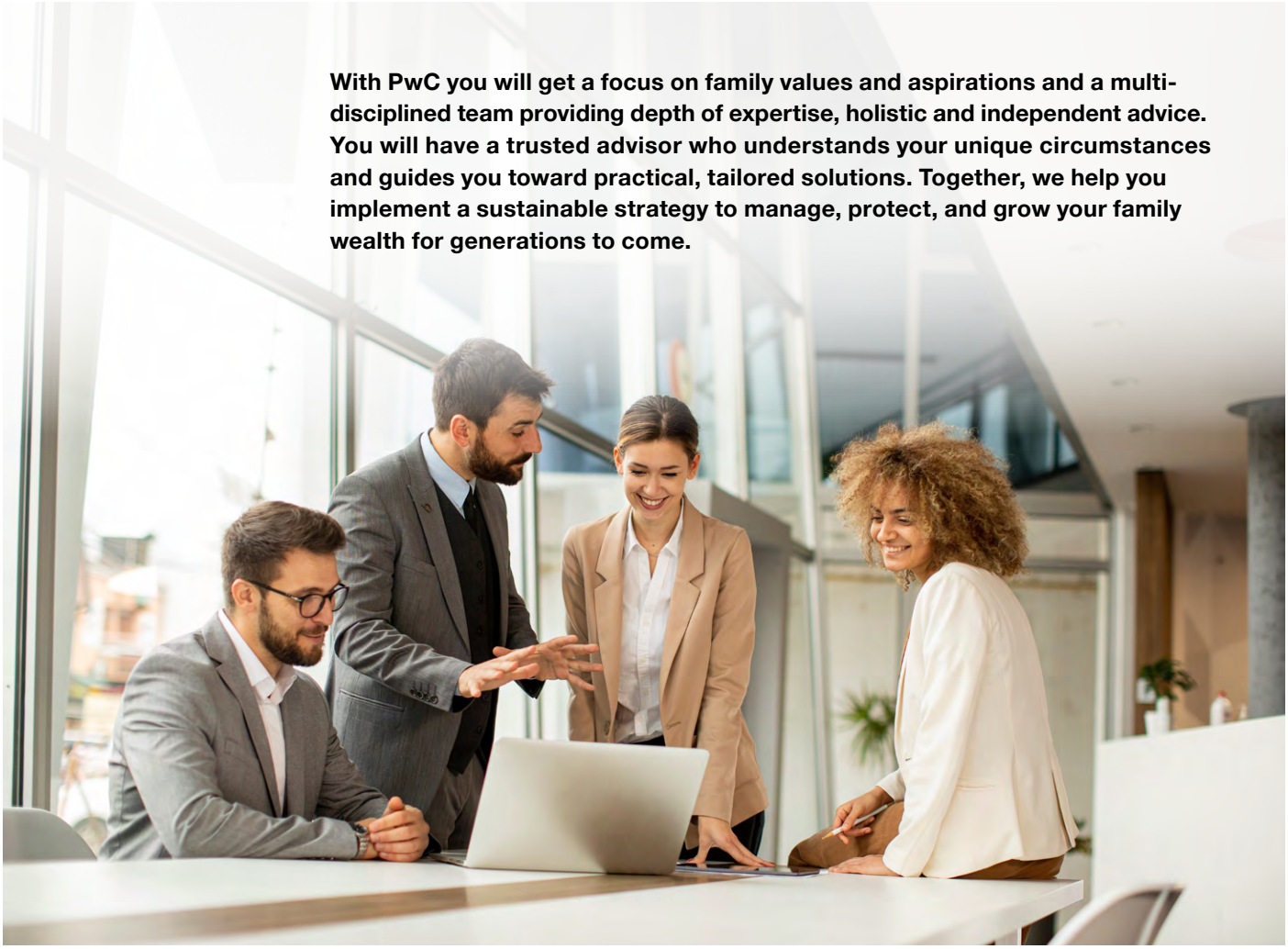
Tax and Compliance
- Global tax strategy and impact analysis for complex family structures
- Automated compliance monitoring and reporting solutions
- Tailored training for family members on evolving tax obligationsPflichten

Wealth Planning
- Matching assets to holding vehicles
- Post sale planning
- Luxury assets
- Real Estate advice

Rechtliches
- Cross-border legal structuring and entity formation
- Contract negotiation and transaction support
- Real estate legal advisory
- Global legal structuring and compliance
- Multi-jurisdictional legal strategy

AI, Data, and Technology
- Technology strategy and operating model
- Data management, governance and reporting
- AI strategy, use cases and implementation
- Responsible AI, security and privacy
- Digital upskilling and adoption

Operational support
- Operational efficiency review
- Family Office diagnostic
- Outsourcing of accounting, tax compliance, data management and consolidation
- Audit and assurance
- Resilience testing and cyber security



With PwC you will get a focus on family values and aspirations and a multi-disciplined team providing depth of expertise, holistic and independent advice. You will have a trusted advisor who understands your unique circumstances and guides you toward practical, tailored solutions. Together, we help you implement a sustainable strategy to manage, protect, and grow your family wealth for generations to come.

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

For more information visit our website



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