



# Family office on a «turn-key» basis in Switzerland

# 1

## Family office on a «turn- key» basis in Switzerland

**Family office** for high net worth people. This is a unique opportunity and a system concept to solve the whole range of problems in managing assets and investments, legal services, medical services, administration and organization of favourable living conditions.

**The term «turn-key»** means that you will not have to invest time and money to create flexible and efficient infrastructure abroad to help you solve most



of your problems and meet your demands. Today you can make use of a ready solution to your advantage.

**The main objective** of the family office is to create your personal comfort.

**Full confidentiality** — is the main principle of our work! We concentrate on keeping full confidentiality of your family office's business.



## Your personal manager

# 2

**Personal manager** is your personal trusted consultant and family strategist.

Over the centuries wealthy people turned to professional managers to have them keep and increase their wealth. Those were people who could be entrusted to solve the most complicated and delicate questions. Today this opportunity is available for you too!

**Trust** is the foundation of the family office. Sometimes it takes years to lay it, but believe us, it's worth the efforts, because it's the opportunity to commit a problem to a person and to be sure that it would be solved successfully. That's what often brings us the longed-for peace of mind and sense of stability.

The main objectives of a personal manager are to coordinate the family office activity and to develop the overall family strategy.

**Family office** includes: financial management, private secretary-accountant, real estate management, legal adviser, family doctor, personal security expert, servants.

**Overall family strategy** includes family wealth and business planning, protection of the family members' interests and succession planning.

Personal manager will also help you with your **philanthropy** planning and control.

# 3

## Financial management



The main objectives of the financial management are integrated financial and tax planning, monitoring of cash flows, selection of financial partners and insurance placement.

The network of the most well-known world banks, private consultants and financial companies are at your disposal.

Search for the best tax consultants and selection of individual tax-efficient schemes are also our priorities. Competent tax planning allows you to minimize your tax returns.

Financial management will help you to understand the functioning principles of banks and investment funds — the most profitable financial tools of our days.

We'll help you to choose trustworthy and profitable proposals, guard your capital, see that your profits would be paid in due time.

Life and property insurance, medical insurance are also important aspects, the family office will certainly take them into consideration.



## Accountant– secretary

# 4

If you ever lived abroad, you know perfectly well, how long it takes to process all sorts of bills the West is so fond of, official letters and telephone calls. Professional secretary will take up correspondence, translating work, running the archives, telephone calls, correspondence with the local government, will deal with current administrative issues.

Punctual and reliable accountant will see that your bills would be paid in time, monitor everyday expenses, and recommend possible options to reduce your expenses.

Office work and bookkeeping being run properly allow you to see clearly the situation in your business.

# 5

## Legal protection

During the years Swiss advocacy safeguards interests of Russian nationals. Among our partners you will find leading Swiss lawyers, who have accumulated huge experience working with Russian clients and successfully settling their problems.

Now you will see a short list of issues a competent lawyer deals with:

- consultations and preparation of legal opinions and memoranda on issues in different fields of law;
- preparation of the necessary documents and further assistance in getting residence and subsequent citizenship in Switzerland;
- assistance in concluding tax agreements;



- preparation of legal documents necessary for the conclusion of all sorts of agreements and for realization of business-projects. Interests of a client will be strictly observed.
- preparation of the foundation documents for legal persons of any organizational and legal forms and legal assistance to the subsequent registration of companies;
- consultations and assistance to the foundation of off-shore companies and trusts;
- legal defense in court, including against criminal action

We can also enlist cooperation of our partners and assistants in Russia and in Western countries to solve any of your legal questions.



## Real estate management

# 6

Your home — your fortress! — You can rely on us entirely, when buying property in Switzerland and other countries.

Through the network of our partners — agents and brokers — we'll give you the best option in the shortest time and at the very best terms. Fine knowledge of the market and the financial schemes will help us make purchasing of property a really profitable investment able to bring you profit in the future!

Family office will undertake the search of a local bank and assist in getting mortgage credit with the support

of our Swiss financial partners. It will also give competent consultations in all aspects of purchasing property abroad.

We'll recommend and find the best architects, construction firms, interior space planning designers and landscape architects to help you create a comfortable home.

In case you don't intend to use your property yourself we'll recommend you a local company which will undertake real estate management, or we ourselves will take care to find a tenant and maintain your property in excellent condition!

# 7

## Family doctor and medical service

Switzerland is one of the leading countries in people's life expectancy in the world.

Healthy life style, beneficial ecology and, of course, the most well-developed medical service in Europe — these are the reasons of longevity of its population. Standards of medical service in Switzerland are much higher here than in the average Europe.



We offer you:

- medical examination and insurance;
- recommendations to the most well-known and prestigious clinics and institutions and the best doctors and specialists as well;
- selection of prophylactic medical service and healthcare programs: diet, fitness, toning and relaxing procedures, services of a cosmetologist and a personal trainer.





## Personal comfort

# 8

Thousands of details form a concept of personal comfort. We'll try to do our best that you'd feel comfortable in every country you visit.

Together with our partners we'll take on:

- selection of your home staff: a driver, a nurse, a baby-sitter, security people, a chef, a translator, a gardener;
- planning of your family arrangements;
- assistance in solving difficult situations;
- selection of educational institutions and supervision for your children;
- planning of business trips, leisure, attendants' service;
- assistance in shopping, advice in buying of antiques, pieces of art, jewelry, luxury items.
- assistance in buying cars and their maintenance.

## 9

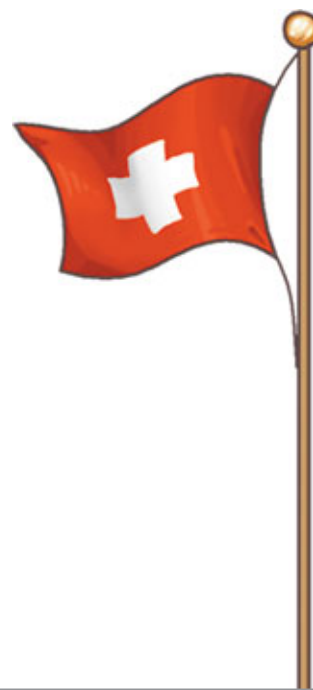
## Benefits of Switzerland

**Centre of Europe.** Thanks to its unique geographical situation Switzerland is an ideal firing pad for your international business activity.

**World's business centre.** Zurich and Geneva are the most well-known financial centers in the world. They are home for a number of the largest banks, insurance companies and financial institutions.

**Unsurpassed standards of life.** Statistics and researches confirm every year, that the standards of life in Zurich are the highest in the world! Geneva and other Swiss cities follow it, they are famous for their attractiveness, cultural diversity, cosmopolitan spirit and unique natural landscapes. The highest standards of medical service and very low crime level contribute to the picture of an ideal place to live and to work in.

**Low taxes and favorable conditions for business.** Up-to-date tax system in Switzerland creates a favorable tax climate for successful business. Interaction with tax authorities both on federal and local level is fast and efficient.



**Developed infrastructure.** Public transport in Switzerland is extremely well-developed. International airports in Zurich and Geneva offer everyday flights to all large cities in the world. Network of rails and highways allows you to get to any point of destination in Europe in the shortest time.

**Switzerland and European Union.** Switzerland is not a member of the EU, but it has close economic and political ties with its neighbor. Special agreements control availability of goods, services and labour to the both markets. Bilateral recognition of the educational systems and medical service and social insurance systems, tax system and double taxation agreements, simplified customs tariffs contribute to the development of these relations.

**Choose, considering the future.** Many largest international companies and businessmen carry out their activity in Switzerland. Pharmaceutical and bio-technological companies, those companies who work in the field of information and telecommunications, trading, natural resources and raw materials companies — all of them have found innovative favourable space for their businesses here.



## Swiss-Russian Business Association

[www.srba.org](http://www.srba.org)

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