Switzerland as a Family Office destination of choice

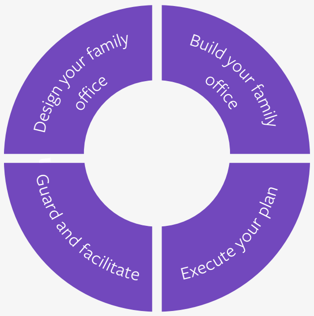
Introduction

Unlocking the opportunities for your family office
Switzerland, renowned for its wealth management, banking industries, outstanding service, and highly professional workforce, emerges as the ultimate destination for families seeking comprehensive solutions for their wealth. In this dynamic landscape, family offices play a vital role in navigating the intricate realm of global wealth stewardship.

IQ-EQ Family Office Services offers a comprehensive suite of solutions, tailored to address the multifaceted challenges inherent to family offices, from our global locations, including Switzerland.

Supporting your family offices' evolution

Our knowledge and experience provides your investors with accurate and timely financial reporting, allowing you to focus on growing your investment management business.



Design your family office
We work closely with you and your advisors to determine how best to structure both your family wealth, and the family office.

Build your family office
We establish the required framework quickly and efficiently to support the governance and efficacy of your family office.

Execute your plan
We collaborate with in-house and external specialist advisors. This can include working in close collaboration with banks, investment managers, luxury asset specialists, insurers, specialist asset administration services and private funds reporting functions.

Guard and facilitate
Our experienced professionals deliver the highest standards of wealth governance, oversight, risk management, compliance and reporting.

We facilitate smooth administration across all services from company secretary, CFO, trustees, property and lifestyle concierge. In addition, we can leverage our full continuum of professional support through regulatory compliance, technology and reporting.

Our Services

Family office establishment and administration
Set up your family office quickly and efficiently with our range of services:

- Working closely with your advisors to identify your needs and how best to articulate your family's values for future generations
- Helping you and your advisors to establish a Family Office constitution or charter
- Structuring, incorporation and administration of your family office structure
- Provision of Company directors and secretary
- Preparation of accounts
- Processing monthly payroll
- Issuing of pay slips and arranging for payment of salaries
- Preparation and filing tax & VAT returns
- Guidance and stewardship for certain employment and permanent residency applications

Legal and tax advice support
We can connect you with our global network of law firms and tax advisors and project manage the designing of your family office.

Asset holding services
In line with the sophistication of your family, we can structure and administer all asset holding requirements including:

- Private funds
- Carry vehicles
- Trusts
- Private trust companies
- Family holding companies
- Foundations
- Family investment companies
- Limited partnerships
- Loan or registered agent services (including equivalent fiducie in France)

Asset protection

We work closely with your specialist advisors to help design suitable global strategies for the protection of wealth, particularly in relation to:

- Compliance within a changing international tax, regulatory and legislative environment
- Family relationships and protection from disputes
- Intergenerational transfer of wealth
- Privacy and reputational considerations

Risk management, compliance and reporting

Ensuring your family office and investment structures comply with the ever increasing regulatory and reporting environment. This can include:

- MaxComply, our adaptable and customisable compliance software helps family offices, families and corporates manage their AML/KYC regulatory activities effectively and efficiently
- Numerous forms of regulatory applications and annual filings in multiple jurisdictions globally
- Monitoring regulatory changes globally to ensure compliance at all times
- Assisting with regulatory licensing and compliance (Compliance Services and non-financial Risk Management Services)

Concierge Services

We also provide personal concierge, lifestyle and property care services in Switzerland including:

- Sourcing and purchasing property
- Property management and security
- Lifestyle services
- Education: organise private tutors, music lessons, summer camps, coursework, university applications and placement to a desired school or university
- Staffing requirements, no matter how bespoke
- Assist with personal banking and payments
- Assist medical and health appointments
- Manage all travel needs either for business or pleasure, from planning and arranging detailed travel itineraries to yacht and aircraft charters

Luxury assets

We have a dedicated luxury assets team that can assist with the establishment and administration of holding structures for many types of luxury assets, including cars, yachts, aircraft and art. We provide:

- Aircraft holding/leasing structures
- Classic car holding structures and management services
- Yacht holding structures
- Structures for holding art collections
- Luxury asset management, secure storage and movement/shipping oversight
- All related regulatory and tax reporting and compliance filings
- Bookkeeping, accounting and accounts/financial statement preparation for all such holding entities (stand alone and consolidated and in line with GAAP)

ESG services

Having the right ESG framework in place has become a top priority for family offices. We can assist with:

- ESG set up
- ESG data acquisition and management

CFO support services

Our Chief Financial Officer Support Services provide assistance to family offices in establishing and operating a strong accounting and financial reporting infrastructure. We tailor the work around your needs including:

- Accounting and administrator oversight
- Budgeting and analysis
- Cash flow control
- Annual audit process
- Implementing new finance and operating systems
- Management company financial control and budgeting

Multi asset class specialist administration

We support the establishment, administration, compliance, and accounting for all types of private funds structures including:

- Liquid and illiquid funds
- Co-investment vehicles
- Hybrid funds
- Private funds
- SPVs and cell companies
- Alternative asset fund administration and domiciliation (private equity, real estate, debt, hybrid and hedge)
- Fund management (regulated and unregulated, including private fund co-investment and joint venture structures)
- Regulatory hosting services in the UK
- Intellectual property administration (patents, image rights and others)

Key facts and figures*

People worldwide	Worldwide location	Assets under administration	Minimum senior team experience	Funds under administration
5500+	25	$750+ bn	20 yrs	800+

Key contacts

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Scan the QR code to learn more on our Family office services.

*Correct as of June 2024

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