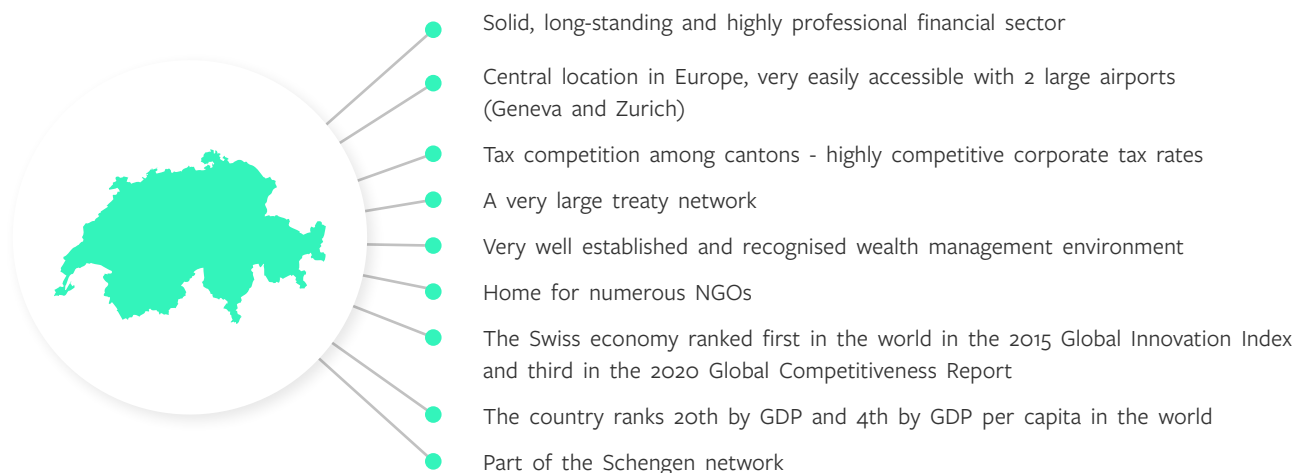




Why

# IQ-EQ Switzerland

Switzerland is a confederation comprising 26 cantons. The Swiss economy benefits from a highly developed service sector, led by financial services, and a manufacturing industry that specialises in high-technology, knowledge-based production. Its economic and political stability, transparent legal system, exceptional infrastructure, efficient capital markets, and low corporate tax rates also make Switzerland one of the world's most competitive economies.



## Why choose IQ-EQ in Switzerland

**Highly experienced and recognised work force:** Specialised in the Private and Institutional Asset Owners and Debt, Capital Markets & Corporate sectors but now developing our Fund Administration capabilities

**World coverage:** Global network of clients and professionals from all continents


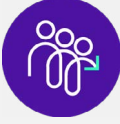
**Commercially minded:** Systematically balancing compliance aspects with a commercial approach

**Open to the world:** We interact with a lot of other IQ-EQ offices around the world, across the various business lines

**Prize winning business:** Twice in a row 'Business Wealth Planning Team' of the year at the WealthBriefing Swiss Awards 2021 and 2022

## How IQ-EQ can help

Our very long term experience, very low staff turnover, global reach and solid reputation has made us a market leader in the Wealth Management arena which we combine with a strong offering on the Corporate side with a complete suite of services such as company formation and administration, provision of directors, accounting and reporting, secretarial work, tax filing, VAT registration and filing, payroll services, among others.

Segments	Our expertise	Our services
 <p><b>Private &amp; Institutional Asset owners</b></p> <p>We are uniquely placed to deliver a suite of asset services specifically tailored around the strategy and desired outcomes of all major asset owners, including institutional and private.</p>	<ul style="list-style-type: none"> <li>• Family offices services</li> <li>• Trusts and foundations</li> <li>• Administrative assistance and reporting for wealthy families</li> <li>• Consolidations of assets</li> <li>• Private trust companies</li> <li>• SPVs</li> <li>• Structuring</li> </ul>	<ul style="list-style-type: none"> <li>• Entity establishment</li> <li>• Provisions of qualified professionals</li> <li>• Luxury assets and lifestyle</li> <li>• Governance and asset holding structures</li> <li>• Trustee services</li> <li>• Foundation council services</li> <li>• Risk management and compliance services</li> <li>• Multi-asset class specialist administration and reporting</li> <li>• Legal and tax supervision with the relevant professionals</li> <li>• Various concierge services</li> <li>• Relocation services</li> </ul>
 <p><b>Debt, Capital Markets &amp; Corporates</b></p> <p>We allow you to focus on what you do best, by handling the rest. Plan your strategies and expansions with ease knowing our global team will be with you every step of the way.</p>	<ul style="list-style-type: none"> <li>• Corporate services</li> <li>• Holding structures</li> <li>• International structuring</li> <li>• Bank account opening</li> <li>• HR services</li> </ul>	<ul style="list-style-type: none"> <li>• Company formation/liquidation</li> <li>• Financial administration and reporting</li> <li>• Cash management</li> <li>• HR support and payroll administration</li> <li>• Corporate Secretarial services</li> <li>• Regulatory and tax filing</li> <li>• Procurement of directors</li> <li>• Transaction monitoring</li> <li>• Office space/domiciliation services (3 cantons)</li> </ul>



## Key facts and figures\*

People worldwide	Worldwide location	Asset under administration	Minimum senior team experience	Funds under administration	Supporting top PE firms
<b>4750<sup>+</sup></b>	<b>25</b>	<b>\$750<sup>+</sup> bn</b>	<b>20 years</b>	<b>800+</b>	<b>11/15</b>

## Key contacts in Switzerland



### Serge Richard

Managing Director

**E** [serge.richard@iqeq.com](mailto:serge.richard@iqeq.com)

**T** 41 22 318 81 21

**M** +41 78 709 09 56



### Frederique Meyer

Wealth Planning (Deputy MD)

**E** [frederique.meyer@iqeq.com](mailto:frederique.meyer@iqeq.com)

**T** +41 44 286 27 91

**M** +41 78 754 4907

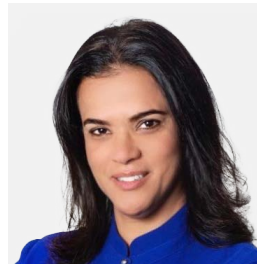


### Janet Palmiero

Debt, Capital Markets & Corporates (Head of Corporate)

**E** [janet.palmiero@iqeq.com](mailto:janet.palmiero@iqeq.com)

**T** +41 44 286 27 86



### Gabriela Amado Boix Marti

Senior Relationship Manager

**E** [gabriela.marti@iqeq.com](mailto:gabriela.marti@iqeq.com)

**T** +41 78243 3982

## Our locations worldwide

### THE AMERICAS

Bermuda  
British Virgin Islands  
Cayman Island  
Curaçao  
USA (Austin, Bedford NH, Chicago, Dallas, Fort Worth, Houston, New York, Rapid City SD, San Francisco & West Palm Beach)

### MIDDLE EAST

United Arab Emirates

### EUROPE

Belgium  
Cyprus  
France  
Guernsey  
Ireland  
Isle of Man  
Jersey  
Luxembourg  
Switzerland  
The Netherlands  
UK

### AFRICA

Mauritius  
South Africa

### ASIA

Mainland China  
Hong Kong  
India  
Japan  
Philippines  
Singapore



**e** privateclient

Top Trust Companies 2021



\*Correct as of February 2023

This document is provided for information purposes only and does not constitute legal, tax, investment, regulatory, accounting or other professional advice. For more information on the legal and regulatory status of IQ-EQ companies please visit [www.iqeq.com/legal-and-compliance](http://www.iqeq.com/legal-and-compliance)

Reference: IH496\_29032023\_02  
© IQ-EQ 2023

Find out more  
[www.iqeq.com](http://www.iqeq.com)

Follow us

