

# Trust and Foundation services in Switzerland

## Introduction

Switzerland is globally renowned for its stability, innovation in financial services, and expertise in wealth management. IQ-EQ's Trust and Foundation services focus on asset preservation, succession planning, and wealth transfer solutions tailored to ultra-high-net-worth individuals and their families. These structures ensure long-term protection, privacy, and the smooth transition of wealth across generations. Our comprehensive services are designed to provide families with peace of mind, knowing their assets are protected and managed in accordance with their wishes.

## Key features of trusts and foundations



### Generational wealth transfer

Trusts and foundations can be set up to endure across several generations, allowing a smooth transfer of wealth over time. These long-term structures are often referred to as “dynastic” vehicles.



### Wealth preservation

Both trusts and foundations enable separation of legal ownership from beneficial ownership, significantly mitigating risks such as creditor claims or family disputes.



### Diverse asset holding

From family businesses and securities to luxury assets like yachts, aircraft, and artwork, trusts and foundations can hold any asset type, providing flexibility in wealth management.



### Tailored solutions

Structures are designed to meet specific family needs, including fixed or discretionary beneficiary interests, with terms adaptable to different family dynamics.



### Regulated services

Swiss trustees and trust companies adhere to strict regulatory standards and are required to be licensed by the Swiss Financial Market Supervisory Authority (FINMA), to ensure compliance with anti-money laundering regulations and other fiduciary duties.

## Why Switzerland?

**Political and economic stability:** Switzerland offers insulation from local political and economic uncertainties, making it an ideal jurisdiction for wealth preservation.

**Trusted financial hub:** As one of Europe's leading wealth management centres, with Zurich and Geneva among the top financial hubs, Switzerland provides access to global financial markets with high standards of confidentiality.

**Innovation in financial services:** As a global leader in wealth management, Switzerland consistently pioneers financial solutions, adapting to the evolving needs of ultra-high-net-worth individuals and families.

**Expert regulatory framework:** Swiss trust and foundation services operate under rigorous regulatory supervision, including mandatory licensing by FINMA for trustees and trust companies, ensuring compliance with legal, financial and fiduciary standards and offering clients high level of security and peace of mind.

## Our services

IQ-EQ's Trust and Foundation services provide ultra-high-net-worth families with comprehensive asset protection and wealth management solutions. We act as a **trusted partner**, offering a **single point of contact** facilitating efficient decision-making and coordinated service delivery in Switzerland, where the structure is operated. Our service approach is rooted in **Swiss private banking standards**, ensuring exceptional client support. With a **central role** in coordinating and collaborating with business partners both in Switzerland and internationally, we provide seamless, high-level service delivery. Additionally, we serve as a **sparring partner** to family offices and trusted family advisors, offering strategic insights and support tailored to each family's unique needs.

Our services include:

### Swiss trustee services

As a licensed and experienced Swiss trustee, IQ-EQ provides regulated trustee services that prioritise the highest standards of security and client confidentiality.

- A dedicated team in Zurich and Geneva specialising in trust and estate planning
- Access to a broad network of legal, tax and wealth management experts for holistic support
- Operating structures under well-established trust jurisdictions such as England and Wales or Jersey

### Trust and Foundation management services

We provide end-to-end administration for trusts and foundations, ensuring legal compliance, governance, and adaptability to unique family requirements.

- Establishment, administration, and day-to-day management of trusts and foundations
- Expert guidance on structuring complex family and personal trusts to meet specific needs
- Tailored solutions to align with family objectives and adaptable to changing family dynamics
- Private Trust Company (PTC) management for families seeking a higher degree of control over assets

## Family Office services

For clients seeking comprehensive family office solutions, we offer services to support the establishment and operation of family offices in Switzerland.

- Establishment and domiciliation of family offices in Switzerland at IQ-EQ offices in Zurich, Geneva or Zug
- Outsourced family office services, including bookkeeping, accounting, HR related services, investment consolidation, reporting, and administrative support
- Compliance services tailored to family office needs

## Additional services

We offer a range of complementary services that ensure flexibility, compliance, and the continued optimisation of trust and foundation structures.

- Succession planning and estate administration for seamless generational wealth transfer
- Multi-jurisdictional structuring to enhance tax efficiency and regulatory compliance
- Ongoing review and optimisation of trust and foundation structures to respond to evolving needs

## Why Choose IQ-EQ for Trust and Foundation Services?

**Extensive experience:** With decades of experience in wealth structuring, IQ-EQ provides a truly global solution, working with complex international families.

**Expertise in local and international legal framework:** Our team is well-versed in both Swiss regulations and international trust laws, ensuring compliant and effective structures.

**Personalised approach:** We blend high-level technical expertise (IQ) with a deep understanding of personal needs (EQ), delivering exceptional client service.

**Continuity of service:** Our commitment to service continuity is a key differentiator, ensuring long-term client relationships and consistent support across generations.

## Key facts and figures\*

People worldwide	Worldwide locations	Assets under administration	Local presence in Switzerland	Services offered in
<b>5800<sup>+</sup></b>	<b>25</b>	<b>\$750<sup>+</sup> bn</b>	<b>30yrs<sup>+</sup></b>	<b>English, German, French and Spanish</b>

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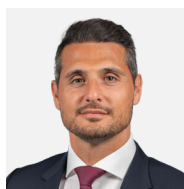


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\*Information correct as of December 2024

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