Tax

— and estate planning

Wherever you live or wherever your assets are located, we can help you find and implement solutions tailored to your individual circumstances.

Our services

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Analysis of tax exposure relating to companies and business owners

If you are a business owner, we can optimise the tax implications arising from your connection to the business when buying, selling or passing it on to family members. We also consider governance arrangements and plan ahead for income streams such as salaries and dividends.

Analysis of tax exposure and property transaction optimisation

We are equally attentive to property transactions, including viager sales and direct or indirect property investments.

Wealth protection and estate planning

We provide solutions for estate planning and protecting family assets by setting up testamentary provisions or other arrangements where necessary, including charitable foundations.

Asset protection in the event of incapacity

We can help you make and register a lasting power of attorney.

Our customised solution

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Independent, seasoned advice

Our long-standing experience in wealth advisory enables us to help you efficiently and work exclusively in your interests.

Your one-stop partner for tax and wealth planning

We work together with you to safeguard your wealth and improve your tax efficiency.

Long-term planning for the whole family

We look after your assets for the long term, including planning for successions.

Our comprehensive range of 360° services

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Investments
Wealth planning
Consolidation and multi-bank management
Property services
Financing advisory
Mergers and acquisitions

Mélanie Erb-Zimet,
certified tax expert

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Financial

— and retirement planning

Whether you're employed or self-employed, financial planning and occupational pension provision are essential to protecting your assets and funding your retirement, or providing for your loved ones in the event of death or disability.

Our services

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We are able to provide you with independent support and financial planning services.

Current and future budgets

We can help you estimate your financial needs based on current circumstances and future plans.

Analysis and optimisation of pension arrangements

We analyse your accrued pension assets and suggest ways of optimising your pension from tax and regulatory standpoints.

Advice on retirement planning

Depending on your personal circumstances (marital status, tax residence and occupation), we can project your financial capacity at the time of retirement by using different scenarios, including whether you plan to take a regular pension or cash it in.

Our customised solution

–

Independent, seasoned advice

Our long-standing experience in wealth advisory enables us to help you efficiently and work exclusively in your interests.

Your one-stop partner for nurturing your wealth before and after retirement

We work together with you to safeguard your wealth and improve your tax efficiency throughout your lifetime.

Long-term advice for your family

We analyse the financial implications for your loved ones in the event of death or disability.

Our comprehensive range of 360° services

–

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