

FACTSHEET

Private Clients, Trusts & Estates,
Foundations
A Global Approach for
Sound and Durable Solutions



Experience & Expertise

> Estate Planning

We offer estate planning advice aimed at wealth preservation, the continuity of family businesses and smooth successions. Our services range from drafting wills, matrimonial agreements and succession pacts to setting up asset-holding structures and providing family office services. We also act as executors of estates.

> Family Businesses and Entrepreneurs

We advise families and entrepreneurs on all business matters, including structuring, governance and succession.

> Philanthropy

We advise on all aspects of philanthropy, including setting up charitable foundations and trusts, governance and control, family councils.

> Strategic Tax Planning

We provide comprehensive tax advice in a global context.

> Trusts, Foundations and (On- and Offshore) Companies

We advise on the most efficient structure in an appropriate jurisdiction. We provide complete service, including establishing the structure and providing regular maintenance support, in partnership with the best external service providers and local advisers.

> Expert Advice on Swiss and International Inheritance Law

We offer legal advice and expert opinions on all matters of Swiss and international inheritance law and on conflict of laws.

> Trust and Estate Litigation

We represent clients in all types of litigation relating to wills, trusts, estates and matrimonial agreements.

> Residency Planning and Immigration Advice

We counsel clients contemplating a change of residence. This may involve handling pre-immigration restructuring, negotiating tax rulings and assessing real estate holding structures.

> Compliance and Regulatory Advice

We advise individual clients and financial institutions on various compliance issues under Swiss and foreign laws and regulations, such as the know-your-customer (KYC) rules under various anti-money laundering laws or the US "Qualified Intermediary" Agreements.

> Ancillary Services

We advise and assist our clients in their banking relationships and in the acquisition or sale of unique assets such as works of art, private jets, yachts and real estate located in various jurisdictions.

Skills & Resources

Our Private Clients Group is composed of an international team of experienced lawyers, trained and qualified in both civil and common law. We deliver legal services to private clients and closely held family businesses from around the world, as well as Swiss private banking institutions and trust companies.

«-----specialists highly proficient
at working with individuals
and families-----»

Your Key Contacts



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M.C.J.**

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Schellenberg Wittmer's Private Clients Group features specialists highly proficient at working with individuals and families in the global planning and structuring of both their private wealth and business assets. We also represent our clients in estate and trust disputes.

We draw on a singular blend of skills and resources to provide clients with sound advice that ensures an efficient wealth structure and enables a smooth succession from one generation to the next.

You will find our Private Clients Group recommended by Chambers, Legal 500, and PLC Which Lawyer. In addition, many of our specialists are recommended individually. We have been selected as one of the Top 10 law firms for family businesses in Europe by Campden FB Magazine.



Schellenberg Wittmer is a leading Swiss business law firm with:

- > over 110 qualified lawyers providing in-depth expertise to you;
- > offices in Zurich and Geneva that cover all of Switzerland; and
- > a full-service offering, from focused advice to project management.

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