



Our expertise for individuals, family businesses and entrepreneurs



Welcome

Your wealth is subject to numerous risks that can be of a complex nature and are not always obvious. Such risks are particularly important when you live and do business in multiple jurisdictions. If they do materialize, such risks can trigger severe financial consequences and disruption for you, your family members and your businesses.

KPMG's Private Client team in Switzerland consists of around 40 tax advisors, lawyers and financial experts who can help you identify, mitigate and monitor these risks. To do this holistically and with your specific situation in mind, we call on KPMG's private client advisors in 154 jurisdictions and coordinate seamlessly with a large pool of selected local and international partners.



Hugues Salomé
KPMG Switzerland



Philipp Zünd
KPMG Switzerland

Our expertise

Need assistance in structuring your assets? Unsure about your tax compliance in a particular jurisdiction? Need advice on how best to provide financial security for your loved ones? Look no further than our network of experts around the globe.



As a private client, you will benefit from KPMG's multidisciplinary expertise across our tax, legal, audit and advisory departments. Our knowledge from the corporate world is made available to you.



With us as your trusted advisor, you will receive in-depth insights into the latest regulatory trends and best practices, fast access to a Big Four global network and support from leading specialists whenever and wherever you need them.



Our solutions are tried and tested, and designed to meet not only the needs of private clients but also their businesses. That's why we count high-net-worth individuals with their businesses, entrepreneurs and top executives among the clients we serve. Protect your wealth today and for future generations.





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**Protecting your wealth
secures the well-being of your
loved ones and helps you
focusing on issues where you
have the greatest impact.**

KPMG Private Clients

Cross-border relocation

Moving can be an emotional process, but it is also associated with specific tax and legal risks as well as planning opportunities. Relocating to Switzerland or another country throws up questions about tax-efficient residency, corporate structuring and investments. This is true for entrepreneurs, top executives and high-net-worth individuals alike.

Non-Swiss nationals taking up residence in Switzerland for the first time can take advantage of the favorable lump-sum taxation regime while attractive alternatives are also available under the ordinary tax regime. At the same time, the various legal arrangements you may have put in place could fail to be recognized or trigger adverse tax consequences in your new place of residence. That is why a careful analysis of all relevant jurisdictions is vital in advance of your planned relocation.

We support you in all aspects of choosing your place of residence in Switzerland and around the globe with a view to identifying and implementing possible changes and optimization measures.



Your KPMG experts



Rinaldo Neff



Simone Leonardi

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You decide where
you would like to
live and we manage
the rest.”

Wealth structuring

We advise all types of private clients, especially high-net-worth individuals, entrepreneurs, top executives and family offices. Whether you have an existing family office, are just exploring options for one or are managing your assets by other means, our professional team of advisors can help you with all relevant challenges.

How you own your wealth is relevant for the control you may wish to exercise over the assets concerned as well as the various risks they may be exposed to. To strike the right balance, wealth structuring needs to be analyzed carefully and from different perspectives.



Your KPMG experts



Hugues Salomé



Philipp Zünd



**We provide bespoke
advice to structure
and protect your
wealth.**

Succession planning and philanthropy

Private clients and especially entrepreneurs can choose from a wide range of options for passing on assets over generations. Your assets, estate and loved ones may be particularly at risk if you have been living in multiple jurisdictions. Bespoke solutions can ensure that your wealth is transferred according to your wishes.

We can help you draft wills, mandates in anticipation of incapacity as well as marital and inheritance agreements. Upon request, we may also serve as executors of your will. We're also experienced in supporting private clients who wish to set up foundations, trusts, partnerships or companies limited by guarantee.

Getting non-profit ideas started together with you is our passion. We act as trusted advisor to founders, foundation board members and managing directors of foundations, offering comprehensive, custom-tailored solutions from the initial idea to the establishment and all issues that arise during the life cycle of a foundation.



Your KPMG experts



Nathalie Fässler



Hugues Salomé



**Preserving your
lifetime
achievements
is our aim.**

Family businesses and entrepreneurs

Whether you want to set up a new business or have an existing company in good hands, we provide you with comprehensive advice regarding your family, business and structure.

From reorganizations and transactions to tax planning and compliance services, we support you with our holistic and sustainable approach. This allows you to focus on the essentials of your business while we ensure that the company meets its tax and legal obligations. At the same time, we always keep your interests as the owner in focus.



Your KPMG expert



Markus Vogel

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**We support you and
your businesses
holistically regarding
all tax and legal topics.**

Top executive services

Top executives who work internationally are confronted with a multitude of tax, legal and social security issues. We analyze your personal situation taking into consideration all the relevant national and international regulations to provide you with tailored advice.

This not only includes employee matters, but we also provide advice from an employer's perspective with a view on reward-related aspects as well as all questions around equity-based compensation schemes.



Your KPMG expert



Raphael Lang

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We offer top executives the custom-made advice they deserve.

Global compliance

Complying with tax filing requirements and monitoring the process is an important challenge for internationally mobile private clients. To ensure that you meet your liabilities in a timely manner, we collate the necessary information and documents centrally. We support you in ensuring compliance – both nationally and internationally.

Furthermore, compliance is always the start for optimizing an individual set-up or detecting relevant issues. Based on our experiences and global network we advise you holistically on potential tax and legal issues.



Your KPMG expert



Oliver Blank



**Rest assured that
you comply with
your tax obligations
around the globe.**

Liechtenstein

Liechtenstein, being a member of the European Economic Area (EEA), offers a high level of political continuity and stability. Accordingly, Liechtenstein can be an interesting option for structuring your assets.

Liechtenstein not only has a long tradition as a place for foundations and trusts for estate planning, but is also very attractive for ordinarily taxed companies. For example, Liechtenstein does not levy any withholding taxes on dividends. A private asset structure that is only subject to minimum tax also offers attractive planning opportunities.

We can provide you with comprehensive support to ensure that your Liechtenstein structure fully meets your needs, both in Liechtenstein and in the other jurisdictions in which you have a presence.



Your KPMG experts



Markus Bürkler



Till Ferst

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**Liechtenstein offers
attractive solutions
for structuring your
assets.**

German Tax & Legal Center

KPMG addresses the special challenges of the German-Swiss economic area through an expert team of German tax advisors and lawyers: the German Tax & Legal Center.

As a client, you benefit from our many years of experience and profound understanding of the particularities of relevant tax issues in both countries. We provide you with a perfectly aligned German and Swiss tax advice!

Additionally, our team of experts compiles tax reports for you on assets and income held on foreign bank accounts.



Your KPMG expert



Heiko Kubaile



**Master the complex
tax challenges
between German
and Swiss tax law.**

US tax services

If you have a connection to the United States – citizenship, a Green Card, time working in the U.S. or even U.S. situs assets – you are likely subject to U.S. tax obligations. KPMG Switzerland is among the handful of firms in Switzerland offering fully integrated U.S.-Swiss tax compliance and consulting services.

Our U.S. tax professionals have all lived and worked both within and outside the U.S., which complements our U.S. tax expertise with a comprehensive understanding of wider international tax issues.

We can help you address both straightforward and complex U.S. tax issues, such as dispute resolution, delinquent filing and the IRS “streamlined procedures”, wealth and estate planning, FATCA, guidance on structuring the ownership of U.S. investments or simply complying with annual U.S. tax filing requirements.



Your KPMG expert



Andrew Vincett



**Swiss and US tax
services under
one roof.**

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In the longer term, you will benefit from a single point of contact for our capacity to monitor tax, legal and regulatory developments throughout the world and to anticipate changes.

KPMG Private Clients

Further KPMG expertise



Cyber Security

The increasing dependence on technology for core business processes (IT enabled transformation) renders information confidentiality, integrity and availability essential. It puts forth the need for effective and risk-based information security planning. KPMG's technology consultants assist clients in conducting risk assessments by identifying technology threats and vulnerabilities, evaluating business impact (BIA) as well as compliance exceptions.

Matthias Bossardt, Head of Cyber and Digital Risk Consulting



M&A

Deals today are no longer simple transactions. They demand answers to new questions. The latest regulations, evolving data protection laws and new cross-border trade agreements are just a few of the many issues that need to be considered. We offer you a seamless team of multidisciplinary professionals from Mergers & Acquisitions, Legal, Transaction Services, Valuation Services, Real Estate and Restructuring.

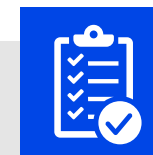
Timo Knak, Head of Deal Advisory and Head of Mergers & Acquisitions



KPMG Law

In today's complex and rapidly evolving legal environment, you expect more than sound legal advice. You are looking for a trusted advisor who provides commercially inspiring ideas and enables you to meet your global legal challenges. We aspire to be your law firm of choice thanks to our global reach and a multidisciplinary approach that leverages digital capabilities.

Adrian Tüscher, Head of KPMG Law Switzerland



Audit

Build trust and transparency. We offer high-quality, independent audit services that harness innovative technology to deliver deeper insights. The external audit function promotes the security and transparency of information essential to investors and the capital markets. KPMG's auditors are well aware of their great responsibility in this regard.

Lukas Marty, Head of Audit



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**Our personal approach combined with
global, multidisciplinary expertise makes
KPMG unique for Private Clients.**

Locations





kpmg.com/socialmedia



kpmg.ch

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