

Tax and retirement planning

Through this service, backed by a network of external experts, we offer our private banking clients domiciled in Switzerland a complete tax consulting service covering all their financial needs, proposing personalised and long-term solutions.

Private Banking clients

This holistic financial planning approach comprises the following services:

- ***Wealth planning:*** we analyse your personal wealth situation and seek solutions to your requirements, taking account of the legal, fiscal, shareholding and succession context.
- ***Retirement and insurance planning:*** we examine whether your pension provision represents the best possible response to your requirements.
- ***Inheritance planning:*** should you wish to plan the inheritance of your estate, we offer consulting services that aim specifically at meeting your objectives.

Contact

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