

# OUR STRENGTH: THE PERSONAL TOUCH

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The consultancy firm that puts you first.

*mandaris*⊕



# WE ALWAYS GET PERSONAL

**F**or us, you are at the heart of what we do. We take the time to talk with you, so we can get to know you and understand and appreciate what you do – because a successful consultant needs to focus on the person, and on what makes every person unique. Only in an atmosphere of partnership and professionalism, where both sides feel confident and secure, can innovative solutions be found for building a successful future.



### **A company you can rely on**

At Mandaris, you'll always have a team of specialists at your side, put together specifically to meet your needs. Among our long-time employees, the team spirit is tangible. We are open in our communications and fair in our dealings, be it with business partners, official bodies or media representatives. Your client adviser combines the results that our skilled specialists produce. As your point of contact, he or she will discuss developments and solutions with you, face to face. Thus you always have an overview of the current situation.

### **Good experiences across the generations**

For us, customer loyalty is far more than just a catchphrase. It's a challenge that we meet. That's why it's not unusual for us to have clients who have relied on our services for two or even three generations. To make sure it stays that way for many more generations, we put our time, knowledge and commitment at the disposal of every one of our clients. You will certainly profit from a partnership distinguished by our national and international experience as well as our first-class, individual, and bespoke service.

# NATIONWIDE ROOTS, WORLDWIDE NETWORKS

If you live in Switzerland, you can hardly fail to notice the considerable strengths of this small country: a pioneering spirit and the determination to achieve, discretion and integrity, adaptability and specialisation, thoroughness and dedication to quality and, not least, political and economic stability. The landscape is so varied, the population so multilingual – yet the country is too small not to have to look beyond its borders. And that's Mandaris – typically Swiss, yet open to the world.

## **Cosmopolitan approach for benefits at home**

We like to be close to you: our company is multilingual and maintains branches in Basel, Zurich, Zug and Malta. More-over, we have excellent partnerships with specialists all around the world. In other countries, we work with qualified experts at the highest levels. Naturally, we travel to you in person, if you or your project require it. For us, the professional dialogue with experts worldwide is simplified by the fact that several of our employees qualified or completed their education abroad. This ensures that your global activities and ideas do not suffer because of cultural differences or local circumstances.

## **Well set up, with a worldwide network**

Our international approach guarantees the quality of our wide-ranging, cross-border consultancy services. We make use of our excellent contacts, extensive expertise and advanced technology to build up increasingly effective networks. We have special regional desks focussing on our clients abroad, helping us to look after specific countries, regions and markets in the best possible way. That puts us in a position to find the very best solution for your particular requirements quickly and accurately, and to implement it for lasting success.





# SPECIALISTS WITH AN EYE FOR THE BIG PICTURE

**T**he complex interactions in a globalised world should be met with a holistic approach to asset and corporate management. Mandaris has the necessary expertise and insight to do just that.

## **A comprehensive service for corporate and private clients**

Mandaris is an international trust and consultancy company. We look after companies and prosperous individuals in Switzerland and abroad. Our Private Client Services range from legal and tax advice to inheritance planning and family office services, including the setting up and administering of companies, trusts and foundations. Similarly, our Corporate Client Services encompass legal and tax advice, all aspects of accounting, corporate consultancy, membership of compliance and management boards and support for expatriates. Our securitisation services complete our service offer.

## **Good reasons for good results**

Transparency in our invoicing and management activities is a high priority for us. Streamlined structures, short decision-making paths and continuous efficiency monitoring ensure that our services represent good value for money. This means that Mandaris can afford to pay special attention to detail in dealing with its clients' specific needs. Whichever of our wide range of services you opt for, and however you combine them, our work is always based on legal requirements and industry-specific regulations as well as on regular quality checks.

## **Private Client Services**

The interests of an individual or a group of individuals are at the heart of our service: legal and tax matters, inheritance planning or setting up and administering companies.

## **Tax advice for private clients**

Examining all taxation issues on a national and international level constitutes an integral part of comprehensive financial planning. Our experienced specialists can show you ways to optimise both your privately owned assets and those of your companies. We think about tomorrow today, which enables us to advise you on choosing the best framework for your tax planning – not only in Switzerland, but also abroad. We help private clients from abroad to take up residence

## **Corporate Client Services**

For operating companies, our services encompass advice on legal and tax issues, salary administration, accounting and corporate consultancy, advice on compliance, serving on management boards and providing fiduciary services.

## **Tax advice for companies**

For us, taxes are not an impenetrable tangle, but a clear thread running through all our detailed planning. By analysing all aspects of taxation – both national and international – our experienced advisers and internal and external experts will explore the best ways of optimising the tax situation for your company. When choosing the best tax planning structures in Switzerland and elsewhere, we also take account of your future needs.

in Switzerland and negotiate tax rulings. Naturally, our services also include handling your tax returns and requests for reimbursement, checking your tax assessments and calculations, preparing objections and taking legal recourse and representing you in front of taxation and tax law authorities.

### **Inheritance planning**

What you have built up can become a burden for you and your descendants unless you think thoroughly and in good time about inheritance and your legacy. Thanks to our forward-looking inheritance-planning service, you do not need to worry about a generational change. Transferring your private and business assets and dealing responsibly with your inheritance requires detailed knowledge, sensitivity and experience, especially in an international context; our specialists

have been specifically trained for this. Several of them have a great deal of experience in setting up corporate structures such as foundations and British- and American-style trusts. Mandaris has a subsidiary which operates exclusively as a trustee.

### **Legal advice for private clients**

Our legal experts can put a great deal of specialist knowledge in the field of asset management, matrimonial property law, inheritance law and international business law at your service. Drawing up marriage and testamentary contracts, wills and executor mandates, and dealing with the distribution of estates, Swiss and other company and contract law, fiscal and banking law are all important elements of this work. We are also happy to prepare expert opinions for you.

We can assist foreign companies with setting up a company in Switzerland and negotiating tax ruling. Of course, our services also include handling tax returns of all kinds and claims for reimbursement, checking your tax assessments and calculations, preparing objections and taking legal recourse and representing you in front of taxation and tax law authorities.

### **Corporate consultancy and fiduciary functions**

With our business administrators, accountancy and fiduciary experts, your finances are in safe hands. They will apply their technical knowledge and experience to organising your finance and accounting systems (financial, operational, debtor, creditor and payroll accounting, consolidation) or other company operations as effectively and efficiently as possible.

Management organisation, staffing, performance management, finance and investment matters, business appraisals and questions of social security or VAT all come within our remit. When it comes to financial constraints or divesting assets, we will advise and assist you. We help out by providing interim management services. In your business transactions, we offer our services as fiduciary owner or escrow agent.

### **Instructed to act for corporate bodies**

As a result of our many years of experience and our knowledge of company law, we are familiar with the requirements for companies of all sizes and will sit on management boards in Switzerland or elsewhere. Our closeness to our clients enables us to respect the special circumstances of family-owned companies. We will also act as administrators or liquidators

### **Interface between private and corporate assets**

A company often represents a major part of the total assets of a private individual. We can act as your point of contact on all matters of investment and finance, while taking account of your private circumstances. We can assess your company, support you by producing feasibility studies and help you with setting up or buying/selling a company or property. We will monitor your holdings for you and can prepare shareholder commitment contracts and other contractual material.

### **Family office**

Assets have to be cared for and organised on a daily basis, especially if some members of the family move abroad or your family's assets are located in more than one country. Family governance and strategic planning

for family members and their assets then become critical if the family's assets are to be preserved for future generations. Our family office service spares you this demanding task. Thanks to our collective expertise and reliable contacts with well-known international specialists, we can work with you to find solutions that more than meet your needs. Our family office team delivers tailor-made services under one roof, helping you to restructure, manage and safeguard your assets – thereby relieving you and your family members of this burden.

and play the role of mediators in achieving a successful outcome. If you are in the process of buying or selling a company, we can help you with the legal, financial and fiscal due diligence procedures.

### **Compliance**

Do you lack the capability to handle the risks resulting from legislation on compliance and due diligence? Our Compliance Team will advise you if you wish to reorganise or strengthen your company's system of controls. We handle all compliance issues for you, allowing you to keep risks under control and get on with your job.

### **Legal advice for companies**

We help you with setting up your company and applying for residence and work permits for you. We also represent you before the

authorities. We can advise you on legal issues such as how to draw up company and shareholder commitment contracts or employment contracts for your employees and managers, as well as expatriates. We work with your legal advisers in other countries in the complex field of international business law. We support you in converting your company to a different legal entity, relocating your head office in Switzerland or abroad, handling mergers, restructurings and liquidations.





# A WELL- REHEARSED TEAM

**F**or us, people always take centre stage. Whether it's our clients or our employees – we take good care of them, thereby creating the basis for a harmonious long-term partnership. The daily interplay of technical and social expertise, a customer-focused approach and excellent communication allows us to provide high-quality services in a flexible and timely manner.

#### **Experienced experts with personal commitment**

Being able to contribute ideas, get involved and help with decision-making are essential requirements for each and every member of our team if we are to achieve success – and that means customer satisfaction. Because they partly determine performance and efficiency, our employees need personal qualities such as dedication, flexibility, awareness of their responsibilities and the ability to work on their own initiative, sensitivity and the skills of a diplomat. Our teamwork always respects everyone's expertise and observes clearly defined areas of responsibility.

#### **Trained to give outstanding performance**

We do a lot for our employees too, because the happier they are, the more constructively they work as a team and the better the quality of the solutions they find for you. For us, creating a motivational working environment is as natural as being open in our communications and building up a contagious team spirit. We place great store on providing regular training and professional development in technical subjects and facets of management as well as in personal development.

# PERFECTIONISM SINCE 1933

**M**andaris is one of the oldest international fiduciary and consultancy companies in Switzerland. Originally founded in Zurich in 1933, the financial services company now operates from offices in Basel, Zurich, Zug and Malta, where its employees create innovative added value for discerning clients

## **A traditional company, looking to the future**

Since it was first established in 1933, our company has moved from being purely a fiduciary company to a fully-fledged international consultancy company. It has always been of critical importance to spot new trends and seize opportunities – and this has opened up new partnerships, areas of business and markets for our company. At the same time, we have regularly thoroughly reviewed its strategy and structures and adapted them to suit changing market conditions – and this is an ongoing task. Mandaris today is in an excellent position from which to assert itself in a business world that is ever changing. We aim to be both reliable and flexible in partnering our clients into an exciting future, with a clearly identified corporate culture and tried and tested business principles.

## **Commercially independent and committed to high standards**

As an independent service provider we offer unbiased and valuable advice, focussing our work on processes not products, acting with prudence and foresight. The advantage that an owner-managed company has of not needing to take account of any overriding economic structures or interests gives us the freedom to provide our clients with services that are customised down to the smallest detail. At the same time, Mandaris operates according to quality standards that meet the highest standards in the financial sector – especially regarding compliance. Our close ties with the authorities in Switzerland and other countries help us to keep abreast of important trends and new developments and to set our course accordingly at an early stage.





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