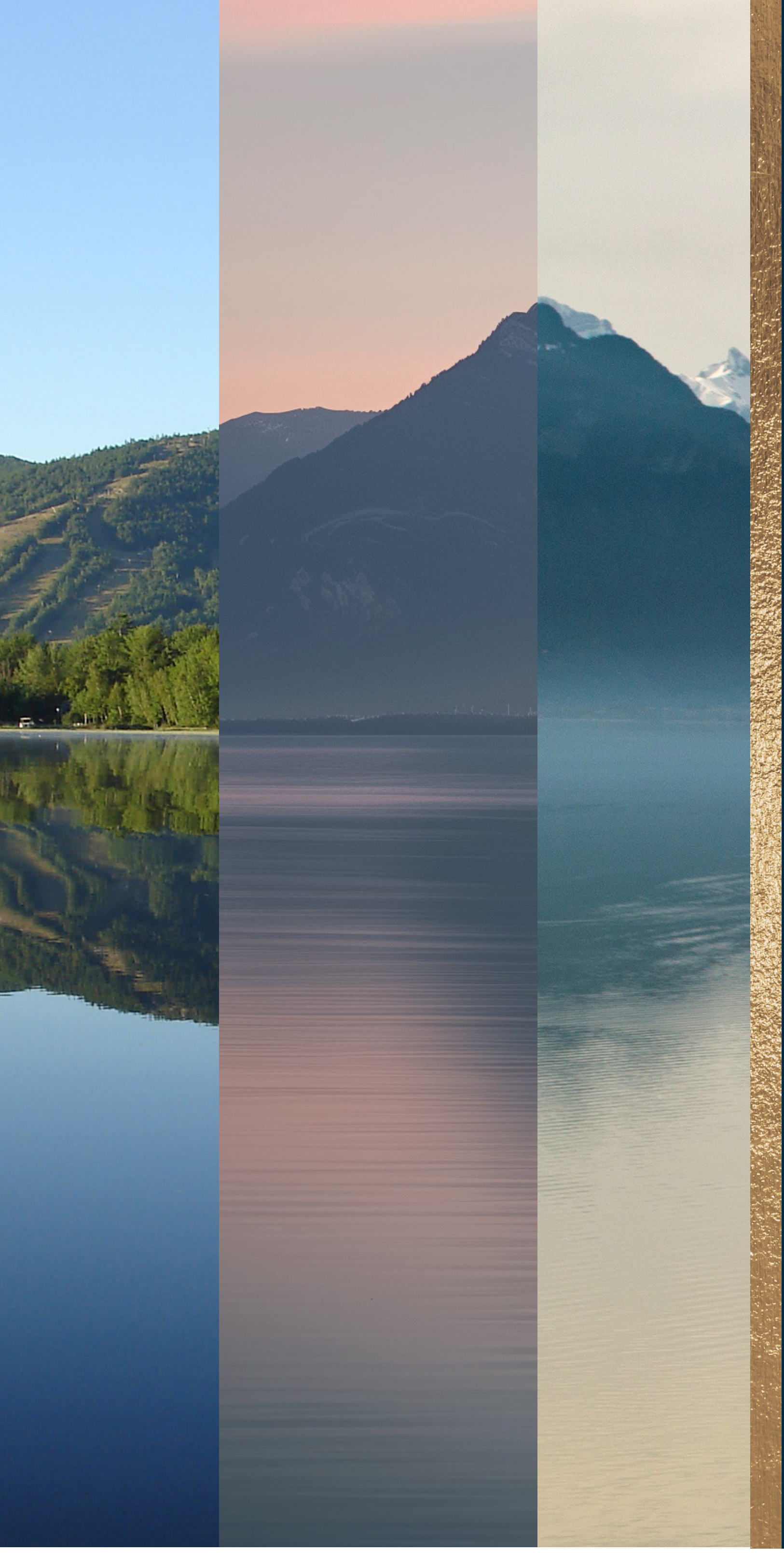
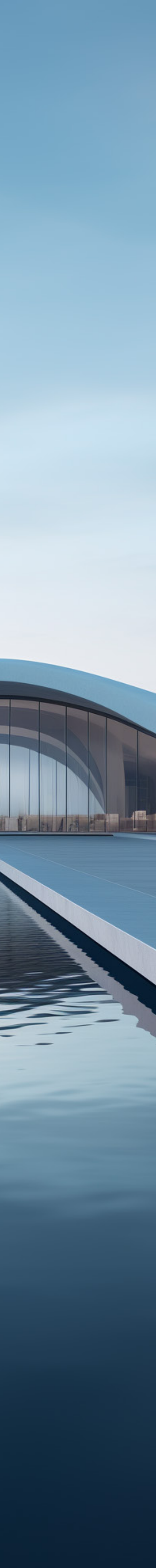


Wealth Planning

MIRABAUD

Crafting your legacy



OPTIMISING RETIREMENT PROVISION

Use pension provision to stay in control of your tax outgoings in years when income is greater, or when the family situation means children can no longer be taken into account. Optimise your wealth allocation between movable and immovable assets, and provident funds.

FINANCIAL PLANNING

Together, we prepare a costed decision base through detailed financial planning according to your professional, private or transfer plans. Benefit from your overall wealth situation being monitored over time.

PLACE OF TAXATION AND TAX SYSTEM

A comparative review will provide you with a forecast of your tax burden when accumulating provident fund assets. If tax on expenditure becomes a sensible choice, we review the options available to you.

PENSION FUND SOLUTIONS

Plan for the future with a customised pension fund plan as a freelancer or entrepreneur. Offer a market-competitive plan as a potential employer.

INHERITANCE AND DONATIONS

Get your inheritance arrangements in order well in advance. Depending on your wealth distribution and protection goals, we will help you find the right matrimonial or inheritance law instrument to avoid tensions or disagreements between your heirs.

REAL ESTATE

Each real estate portfolio is unique. With support from our partner brokers, we analyse your goals to find the best financing solution for you. Your real estate portfolio can also benefit from more comprehensive financial planning.

BUSINESS TRANSFERS

Transferring your business is a complicated process that often requires specific skill sets. By working with external experts, who will take care of the transaction itself, we support entrepreneurs in making the right choice for their own remuneration, but above all their pension funds. Often neglected, this latter aspect needs a strategy tailored to each individual situation.

PHILANTHROPY

Would you like your overall wealth planning to include an additional component ? We put you in exclusive contact with one of our partner foundations, allowing you, for example, to allocate a fraction of your long-term wealth to a cause of your choosing.

Available for Swiss residents

360-DEGREE SUPPORT

Together, we review your asset situation as a whole, based on your initial situation, to identify any areas that can be optimised. After a comprehensive analysis, we design customised solutions, allowing you to make an informed decision.

Based on any other needs you may have, we work closely with an extensive network of external partners we have rigorously selected. This network consists of mortgage brokers, occupational pension solution specialists, philanthropy experts, tax lawyers, as well as experts from other legal fields. Together, we prepare a range of customised solutions and monitor the option you have chosen over the long term.

Questions around the following topics
Pension provision, Taxation
Real estate, Inheritance and donations, Philanthropy

Plan of action
Deciding on measures to be taken and presenting a clear implementation plan

First meeting
Gathering information, identifying opportunities for optimisation and answering initial questions

Implementation and monitoring
Wealth Management
Asset Management

Network of partners
Mortgage brokers
Occupational pension solution specialists
Philanthropy experts
Tax lawyers
Experts from other areas of law

Your Wealth Planning Advisor

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