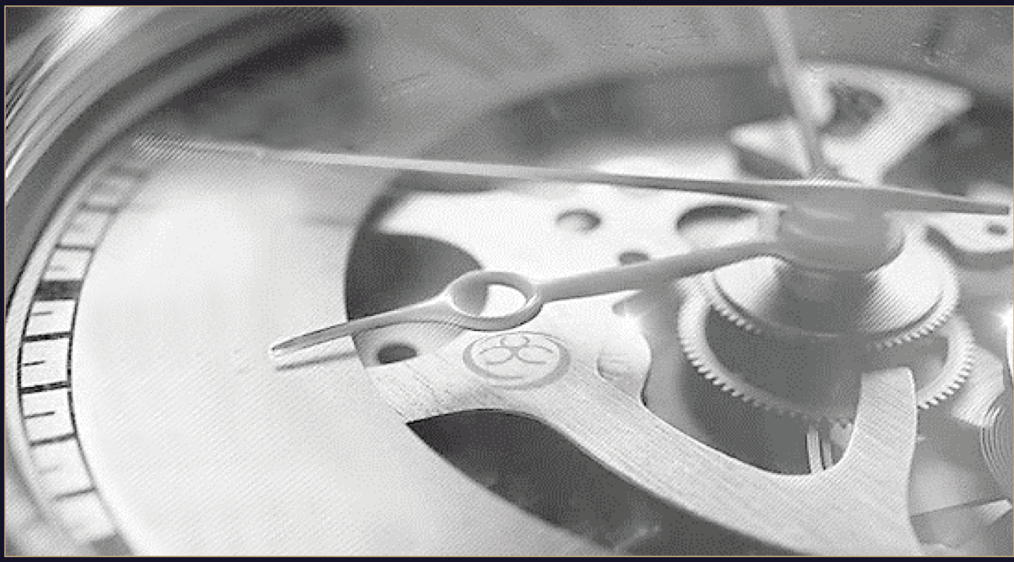
CW PARTNERS



A Multidisciplinary Advisory Firm

Operating as:

- **a multi-family office and trust company** to address the needs of select individuals and their families
- **a unique center of international expertise** in wealth planning, legal and tax, financial and accounting for wide-ranging and complex needs

A holistic approach combining tradition with modern thinking and our diligence in considering all angles from a technical, practical and strategic point to structure our clients' affairs and provide ultimate peace of mind.

Our Team

A team of highly qualified and experienced Advisors consisting of Lawyers and Tax Advisors, Certified Accountants, Attorneys and Corporate Structuring experts, all of whom are members of national and international professional associations.

A unique blend of expertise and ability to understand the issues affecting different family dynamics and cultures, allowing our Advisors to provide tailor-made services to help our clients protect and grow their family's wealth.

Our experts provide estate planning solutions, implement and administer them, enabling clients to maintain various structures to navigate legal, tax and regulatory issues in multiple jurisdictions.

Working With Us

- **Expert Advice**

  A combination of technical, practical and strategic skills and expertise

- **Rapid Responses**

  From trusted Advisors with various areas of expertise around the world of expertise in various countries

- **Peace of Mind**

  Our goals are completely aligned with our clients', through a personal, professional and flexible approach

- **Confidence**

  In knowing that the involvement in our clients' businesses and personal affairs is handled with a high level of professionalism and with strict confidentiality

- **Comfort**

  In having a dedicated team that is present to help administer and manage complex structures, multiple bank accounts and other service providers, within highly regulated environments

Wealth Planning and Family Office

Advice

- Establishing the purpose of wealth and advising on long- term governance and wealth preservation across generations
- Reviewing and advising on international wealth and succession planning solutions
- Advising on investments - including but not limited to - real estate, yachts, private jets, race horses, business ventures and financial portfolios

Management

- Managing wealth and succession planning vehicles in multiple jurisdictions
- Structuring ownership of worldwide assets using various types of vehicle including trusts, foundations and special purpose vehicles
- Coordinating with asset managers, bankers and other professional experts

Supervision, Reporting and Compliance

- Assisting with regulatory, tax and reporting obligations
- Implementing efficient administrative processes, through a robust risk management and governance framework

Legal and Tax

Audit

- Reviewing current legal and tax affairs for private individuals, corporate restructuring, mergers and acquisitions
- Coordinating with reputed lawyers and professionals based in various jurisdictions

Advice

- Advising on effective international legal and tax planning solutions
- Advising on the legal and tax aspects relating to real estate, yachts, private jets, race horses, business ventures and financial portfolios

Negotiation and Dispute Resolution

- Advising on claims, negotiation and litigation
- Implementing mediation and litigation strategies
- Managing relationships with local tax authorities in various jurisdictions

Accounting and Financial

Audit and Accounting

- Conducting accounting and financial reviews for corporate restructuring, mergers and acquisitions
- Drawing up comprehensive financial statements and reports

Private Investment

- Analyzing current investment holding strategies and monitoring investment performance
- Assisting in the selection of highly reputable managers and brokers for all asset categories

Banking and Asset Management

- Monitoring and managing relationships with banks and asset managers
- Coordinating various types of financing solutions for private and business purposes
- Assisting with regulatory, tax and reporting obligations

Governance and Board Services

Corporate Governance

- Assessing current needs, the business strategy and culture and governance mechanisms
- Elaborating and implementing individualized governance solutions
- Providing independent advisory, executive and non-executive board members

Family Governance

- Assessing current needs and governance mechanisms and documenting a shared vision
- Creation and maintenance of an individualized effective family governance plan
- Providing independent advisory, executive and non-executive board members

Our Offices

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1204 Geneva
Switzerland

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Contact Us

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