

## *Philanthropy*



*We jointly define and implement your philanthropic goals and your individual strategy. Based on our experience we support you in your charitable undertakings and help you carry them out successfully.*

### **HOW WE ASSIST YOU**

Philanthropy starts with an analysis of your personal values and beliefs. Based on your intentions, we jointly develop an individual profile for your philanthropic activities.

Using this profile we develop a suitable implementation strategy from goal definition to performance measurement. Our advice facilitates the process of choosing projects or assists you establishing your own foundation.

### **YOUR ADVANTAGES**

With our extensive network and long-term experience we know of diverse and practical projects and help you to employ your wealth for a meaningful and permanent value creation.

We place great emphasis on our employees making personal contributions – such as acting as a foundation member or as a trustee. This makes them reliable and experienced partners for an effective implementation of your philanthropic strategy.

# OUR SERVICES

*We accompany you in your philanthropic endeavours with comprehensive advise. We identify suitable projects and evaluate, implement and administer the appropriate legal structures for your plans with a selection of choices that is aligned with your values and interests.*

- Analysing and developing your personal philanthropic profile.*
- Evaluating possible activities from donations to developing a specific foundation or trust.*
- Assisting in identifying and developing projects.*
- Developing the implementation and financing strategy.*
- Establishing, managing and advising on Swiss or foreign charitable foundations or trusts (incl. drafting all founding documents).*
- Revising and submitting tax exemption requests for foundations as well as applications for seals of approval (e.g. Zewo Certification).*
- Comprehensive administration of foundations and trusts (incl. management, accounting in accordance with various standards, preparing financial statements, payment transactions and all other tasks).*
- Coordination with the authorities.*
- Offering a domicile to foundations.*
- Support to identifying and appointing foundation members, trustees or protectors.*
- If desired, active commitment of our employees as foundation members, trustees or protectors.*