

STRUCTURES SOLVING PROBLEMS

FOCUSED SUPPORT AND PROFESSIONAL SERVICE



Incorporating, administering and managing tailor-made structures for the needs of an international client base is the core business of Carey Zurich. This allows our clients to focus on investments decisions and not on execution of administration aspects.

DO YOU RECOGNISE THE PROBLEM?

Many of us do not recognise a problem until it becomes obvious or a third party has recognised it first. Neither scenario is desirable but in today's world, which has become so transparent, it has become all too common. Fortunately, both situations are avoidable, but this requires a proactive attitude to recognise problems before they become a concern.

Various people - private individuals as well as executives and entrepreneurs - accept existing circumstances in their lives or businesses simply because they do not know that there are better, more efficient, cheaper or more focused alternatives to handle issues such as: tax optimisation, succession planning, privacy protection, liability limitation, risk management, asset protection, market access, legal security, stabilisation of cash-flows, performance measuring and reporting.

In most of these cases a legal entity with a special purpose in the centre of a tailor-made structure in combination with certain services and control mechanisms are solutions designed to handle such problems for individuals and corporates.

A "structure" is designed to organise and handle special purposes for individuals and corporations.

In most cases a legal entity with a special purpose, in combination with selected services and control mechanisms, is at the centre of such a structure.

Such structures have to be established and run in order to meet the expectations of the owner as well as fulfilling the legal obligations. Establishing and managing those structures and further providing the services and control around them is the core business of Carey Zurich.

Speaking to us often leads to new insights on how to better organise matters using international legislation that can result in unexpected solutions.

A tailor-made structure can turn your problems into new opportunities.

STRUCTURES TURN PROBLEMS IN OPPORTUNITIES

To address the specific needs of our clients in a tailor-made manner, Carey offers its structure services in three different categories: Corporate Structures, Private Structures and Family Office Services.

Structure Services – An Overview

Corporate	<ul style="list-style-type: none">• Company Formation & Administration• Corporate Services / Legal Affairs• Transactional Services• Intellectual Property (IP) Structures• Director, Registered Offices & Secretarial Services
Private	<ul style="list-style-type: none">• Trusts, Foundation Formation & Administration• Private Investments• Registered Offices• Director & Secretarial Services
Family Office Services	<ul style="list-style-type: none">• Administration of Family Office Affairs• Immigration & Relocation Support• Real Estate Administration• Succession Planning

CORPORATE STRUCTURES

Corporate Structures are designed to meet the requirements of international operating groups. Holding Structures enable them, for example, to reduce tax liabilities and to organise company transactions in a legally secure environment. Carey's services include the whole formation process and the handling of all administrative affairs. Director, Registered Offices and Secretarial Services are also offered.

A brief case study

A non-EU Company wanted to set up a tax optimised structure for license fees within Europe. Carey established a holding company for this purpose in Switzerland where the European patent rights are located. Carey provides full administrative services, including an appointed Director, and takes care of all legal affairs and tax responsibilities. This structure enables our client to use existing tax shelters for intellectual property rights and therefore to realise significant tax-savings within its corporate group.

PRIVATE STRUCTURES

Private Structures are offered to High Net Worth Individuals. Carey's integrated services approach enables them to set up Trusts and Foundations or to establish Holding Structures. Organising private assets, order of succession or charity commitments are typical reasons for establishing private structures. Besides the full-service administration, Carey also offers a wide range of reporting services to provide a complete financial overview at any time.

A brief case study

A British client wanted to undertake wealth planning related to his bankable investments and his business assets. He turned to Carey after the private bank's fiduciary arm refused to hold his business assets and suggested he should structure these separately. Carey set up a parallel structure to manage both asset types and thus provided him and his family with one contact point for, and coordinated management of, all of the assets.

FAMILY OFFICE STRUCTURES

Family Office Services enable Family Offices to broaden their services in the most professional manner by outsourcing special tasks. Carey AG offers to establish structures that offer new possibilities in Private Wealth Management, or to restructure existing structures to adapt, for instance, to new legal requirements or to improve their functionality. Other services like immigration and relocation support, reporting services, real estate administration or succession planning are also designed to support professional Family Offices.

A brief case study

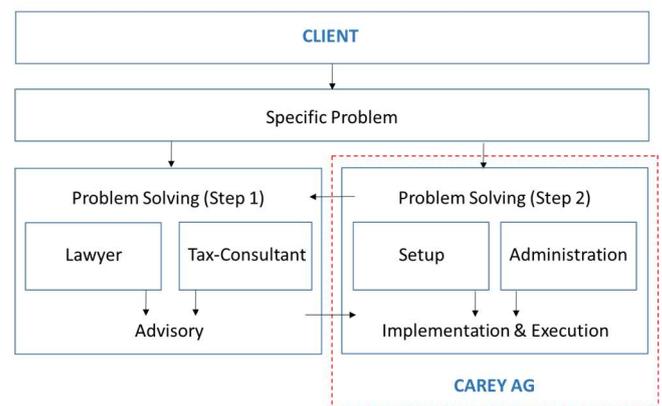
Damaging inheritance taxes - as deployed in many countries around the globe - are threatening the lifetime achievement of a successful entrepreneur. To take advantage of tax exemptions in a specific European country, a relocation of the family was necessary. Carey managed the complete relocation process including all necessary permissions, the finding of a suitable home for the family and appropriate schools for the children as well as the establishment of structures to ensure minimised tax burdens.

INTERNATIONAL STRUCTURES MEET SWISS STANDARDS

Implementing Structures requires both the specific know-how and dedication to the client and their needs. Providing suitable solutions to the client is therefore a two-step process. At first legal and tax consultants analyse the situation and prepare a paperwork solution. In the second stage Carey work closely with the lawyers and tax consultants, bringing the solution to life by implementing it exactly the way it was planned. International clients can count on Swiss quality in establishing and administrating the selected structures.

Efficiency in administration and reporting and therefore minimised follow-up costs are essential for Carey's clients. This is ensured by our experience and expertise in running such structures.

Individual Structures for Specific Problems



Providing services to a high-class customer base requires independence and freedom to select from all of the opportunities available in the market. As an independent fiduciary service provider, we select the best available options without incurring any risk of potential conflicts of interest. We remain independent whilst maintaining strong relationships with reputable financial institutions. This allows us to access a best in class range of banking and investment for our clients.

As Carey does not provide legal and tax services we work in conjunction with your legal and tax advisors. This means that you get the best services available: professional advice from your legal and your tax advisor and professional service from us to establish, run and manage your individual structures. If you do not have already access to specialised legal and/or tax advisors, we can provide a broad network of recommended firms.

CAREY ZÜRICH

In order to offer high quality services to private and institutional clients with both a Swiss and an International base, Carey Zurich was established in 2003. With our worldwide network in key Financial Centers we offer expertise and assistance on a wide range of cross-border and domestic services. Carey is a member of the Self-Regulatory Organization (SRO) for anti-money laundering purposes in Switzerland.

Carey Zurich – your trusted partner in establishing and managing functional structures: Professional, Confidential, Personal.

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