



CAREY – *because we care.*

Multi-Family Office & Professional Trustee

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FUNCTIONAL STRUCTURES



We offer a confidential and truly bespoke service whether to hold a single asset or to consolidate and control a multi-jurisdictional structure for a large family. Our clients are typically entrepreneurs and families who own both business and personal assets. We provide fiduciary services that encompass trusts, private trust companies, foundations, partnerships and other similar structures from a wide range of jurisdictions.

- Private Structures
- Corporate Structures
- Pooled Wealth Structures

MULTI-FAMILY SUPPORT



We provide a broad spectrum of private wealth structuring services to a small number of wealthy families. Besides financial services, we also offer controlling, planning, philanthropic advice, concierge, and other comprehensive services.

As a multi-family office, our clients and their families are benefiting from economies of scale.

- Admin. & Controlling of Family Affairs
- Succession Planning & Mediation
- Philanthropical Projects Support

ACCOUNTING & CONTROLLING



We offer a full range of bookkeeping services, payroll accounting and Human Resource Management (HRM) for employees in Switzerland.

For entrepreneurs of SME's we offer access to a modern consolidation tool and a tailor-made reporting that enables the respective client to become fully transparent and to comply with any operational or legal complexity. We support the client's finance department with any requirement that may occur (e.g. IFRS, year-end processes, ICS).

- Accounting, Payroll & HRM
- CFO & Controlling Services
- Financial Consolidation

CAREY ZURICH

CAREY Zurich, established in 2003, is an owner-managed Multi-Family Office and FINMA-licensed trustee company providing tailor-made functional structures to private clients, wealthy international families and corporates.

Our clients can count on Swiss quality, high ethical standards, efficiency and trust – *because we care(y).*

As the holder of a professional Swiss trustee license, the company is supervised by the Swiss Financial Market Supervisory Authority FINMA.

TAILOR MADE SERVICES

MULTI-FAMILY SUPPORT

- Administration & Controlling of Family Affairs
- Succession Planning
- Real Estate Administration
- Immigration & Relocation Support
- Family Consulting & Mediation
- Charitable Project Support
- 3rd Party Trust Protector & Will Executor
- Concierge & Comprehensive Services

FUNCTIONAL STRUCTURES

Private Structures

- Trusts, Foundation Formation & Admin.
- Private Investments
- Registered Offices
- Director & Secretarial Service

Corporate Structures

- Company Formation & Administration
- Corporate Services / Legal Affairs
- Transactional Services
- Director, Reg. Offices & Secretarial Service

Pooled Wealth Structures

- Project & Requirement Analysis
- Wealth Structuring Advice
- Implementation Support
- Controlling & Reporting



because we care.

ACCOUNTING & CONTROLLING

Accounting, Payroll & HRM

- Bookkeeping
- Audit & Tax Support
- Swiss Payroll Services
- Human Resource Management

CFO Services

- Interim CFO Service / Controlling / Internal Audit
- Bank Search & Account Opening Service
- Financial Restructuring / M&A Services
- Cash Flow Services

Financial Consolidation & Reporting Services

- Consolidation & IFRS Consulting
- Unique Consolidation & Reporting solution for SME
- Consolidation & Financial Statement Support
- Tailored MIS & Cockpit Analysis

WHAT WE STAND FOR

CAREY's core competence lies in the administration, monitoring and controlling of private and corporate structures. We provide a wide range of services tailored to meet your different needs from first to multi-generation entrepreneurs and business owners or beneficiaries. Besides financial services, we also offer planning, philanthropical advice and other comprehensive services. As a multi-family office, our clients and their families are benefiting from economies of scale.

CAREY was the 12th company in Switzerland to have been granted a Swiss license as a professional trustee in accordance with the Financial Institutions Act (FINIG) by the Swiss Financial Market Supervisory Authority FINMA.

CAREY is aiming to bring simplicity and transparency to a complex marketplace. Our team is highly focused on continuously delivering the highest quality tailor-made solutions. Our clients can count on Swiss quality, high ethical standards, efficiency and trust.

Why Carey?

- Independent - Owner managed
- Small & flexible Swiss organization
- Established network of Experts

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