

## Introduction letter

Dear Sir / Madam,

Global competition and relentless technological advances have resulted in fiduciary services becoming a basic commodity like many other goods and services in our world. To remain competitive many of those companies have relied on product innovation or leaner organizations.

We at **Carey Zurich** have chosen a different approach. We believe, that the battleground for differentiation and customer value creation has shifted toward carefully-personalized relationships and customer intimacy.

We characterize **CUSTOMER INTIMACY** by dedicating our services to only a few high-value customers and being obsessive about understanding them in detail. Excel in customer attention and customer service is our mantra. This means that all of our business processes and every Carey member must be focused on identifying and meeting the needs of our customers.

### About CAREY Zurich

Carey Zurich, established in 2003, is an independently owned Multi Family Office offering tailor-made legal structures and solutions to private individuals and corporates and accounting processes. As holder of a professional trustee license in accordance with the Financial Institutions Act (FINIG) we are supervised by the Swiss Financial Market Supervisory Authority FINMA.

Committed only to our customers, we will always choose the best available options without incurring the risk of potential conflicts of interest. As we do not provide legal, tax or investment management services we seek to work in close conjunction with our customers' advisors.



*because we care.*

Thus, our customers obtain the best services available: professional and trusted advice from their own legal, tax and investment management teams and professional fiduciary and financial services from Carey Zurich. In case our customers do not yet have access to specialized advisers, we can provide a broad network of recommended partners.

We strive for a long-term commitment and contribute to real value creation for our customers. This is done through proactive communication, honesty and experience in the work we carry out and undertaking regular consultancy, strategic reviews and planning to each engagement so to become your trusted partner. Our customers can count on Swiss quality, high ethical standards, efficiency and trust - *because we care(y)*.

The enclosed brochure will give you a simple overview of our focus areas and we would be pleased to offer you and your customers our Customer Intimacy approach at the next opportunity.

Yours faithfully

A handwritten signature in blue ink, consisting of a horizontal line that curves upwards at the end, followed by a vertical stroke that extends upwards and then curves back down to meet the horizontal line.

Beat Haering  
Owner