LEO TRUST

ZURICH SINCE 1980

Wealth and Estate Planning

Private Clients

Trusts & Asset Protection

With over 40 years of experience in the successful creation and administration of trust structures, we guarantee the long-term tax-optimised protection of your assets. The special features of a trust enable you to have your property - real estate, investment vehicles, fixed income assets, company participations - managed by a proven expert and your individual wishes taken into account. Assets within a trust are not subject to income or wealth tax and yet you can still benefit from the distributions. Especially in the case of complex family relationships or wishes that are not possible under normal inheritance law, a trust can be the optimal solution.

The transfer of assets or company shares from one generation to the next is a stumbling block for essential errors in the important area of wealth and inheritance taxes. The establishment of a Private Trust Company and various holding companies are structuring the trust sustainably and efficiently. With our focus on securing wealth across generations, we advise you on creating the optimal succession plan.

Case Study : Trust Structure

Within a complex trust structure, assets are often globally distributed. In times of geopolitical change, Switzerland is and remains a safe haven for asset management. The trust has its legal domicile abroad, while the administration by Leo Trust remains in Zurich and is always available for the client's needs.

A Jersey trust structure administered by a Swiss trustee provides the ideal combination of Swiss legal certainty in the administration of the trust and the Island's legal protection in relation to tax and external access. The trust has its legal domicile in Jersey, while the administration by Leo Trust remains in Zurich and is always available for the client's needs. The trust itself can hold the shares of various assets: Companies in offshore jurisdictions, shares or, as part of a structure, private collections, art, and real estate. The distribution within the structure is made as per the letter of wishes of the settlor.

Anchor Your Wealth

We advise on the development of individual strategies and implementation of wealth and succession arrangements. Our approach is a holistic analysis to maintain sustainable wealth structures by balancing a consistent methodology with strategic innovative advances.

Our asset class expertise and their individual administration requirements cover the whole range of wealth allocation from real estate and private collections over tailored investment vehicles to cryto values and philanthropy. The approach to wealth planning is completed by focussing on client needs and evaluated by experts.

Your wealth is subject to our stringent monitoring and reassessment procedures to anchor your interests in a sea of changing requirements and regulations through data integrity and analytic foresight. We also provide you with regular consolidated reports to provide a full wealth snapshot with all relevant activities and opportunities and risks.

Succession Planning

The holistic approach of Leo Trust offers families the optimal support in solving complex, often very private challenges. Our advisors take a solution-oriented but also humanly-empathetic approach to overcoming the often very personal switch points for families in succession and wealth planning, as well as in everyday legal transactions.

From analysis, concept, planning, implementation - all taking into account business management, tax, inheritance law and entrepreneurial aspects - the tailor-made overall concept is created in the interests of the entrepreneur and his company.

Case Study: Succession Planning

When the founder of a successful company goes into well-earned retirement after many years, handing over management to the next generation is an exciting challenge. Often the management style, plans to expand or restructuring the business field or differ between generations and life experiences. The fear of seeing one's life's work threatened on the one hand, the fear of not having full control over the transferred company after all on the other. Leo Trust designs succession planning, taking into account the wishes of all parties involved, as a fluid process in which the established foundations of the company are taken into account just as much as new possibilities for running the business.

Private Collections

Art, cars, valuables - private collections not only have a high financial value, but often also an emotional connection to the owner and collector. The systematic expansion of these collections can be both an exciting passion and a lucrative investment strategy. Through our international network of dealers and experts, we can develop the perfect strategy for you.

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