

OUR STRENGTH: THE PERSONAL TOUCH

The consultancy company that puts you first.



WE ALWAYS GET PERSONAL

For us, you are at the heart of what we do. We'll take the time to talk with you, so we can get to know you and understand and appreciate what you do – because a successful consultant needs to concentrate on the person, and on what makes every person so unique. Only in an atmosphere of partnership and professionalism, where both sides feel confident and secure, can innovative solutions be found for building a successful future.



A company you can rely on

At Mandaris, you'll always have a team of specialists at your side, put together specially to meet your needs. In our long-established workforce, the team spirit is tangible, and we are open in our communications and fair in our dealings, be it with business partners, official bodies or the media. Your own appointed adviser draws together all the results that our skilled specialists produce. As your point of contact, he or she will discuss developments and solutions with you, face to face, so that you always maintain an overview.

Good experiences across the generations

For us, customer loyalty is far more than just a catch-phrase. It's a promise that we keep. That's why it's not unusual for us to have clients who have benefited from our services for two or even three generations. And, to make sure it stays that way for many more generations, we'll put our time, knowledge and commitment at the disposal of every one of our clients. You will certainly reap the benefits from a partnership distinguished by our national and international experience on the one hand and our first-class, bespoke service on the other.

NATIONWIDE ROOTS, WORLDWIDE NETWORKS

If you live in Switzerland, you can hardly fail to notice the considerable strengths of this small country: a pioneering spirit and the determination to achieve, discretion and integrity, adaptability and specialisation, thoroughness and dedication to quality and, not least, political and economic stability. The landscape is so varied, the population so multilingual – yet the country is too small not to have to look beyond its boundaries. And that's Mandarin – typically Swiss, yet open to the world.

Cosmopolitan approach for benefits at home

We always want to be close to you: our company is multilingual and maintains branches in all parts of Switzerland – and excellent partnerships with specialists all around the world. In other countries, we work with qualified experts at the highest levels. Naturally, we'll send our people in person, if you and your project require it. For us, professional dialogue with experts worldwide is simplified by the fact that several of our employees qualified or completed their training abroad. This ensures that your global activities and ideas do not founder because of cultural differences or local circumstances.

Well set-up, with a worldwide network

Our international approach guarantees the quality of our wide-ranging, cross-border consultancy services. We make use of our excellent contacts, extensive expertise and advanced technology to build up increasingly effective networks. We have special national desks focussing on our clients abroad, helping us to look after specific countries, regions and markets in the best possible way. That puts us in a position to find the very best solution for your particular requirements as quickly and accurately as possible, and then to implement it for lasting success – no matter where the answer lies.





SPECIALISTS WITH AN EYE FOR THE BIG PICTURE

If you're going to take account of the complex interactions in a globalised world, you have to take an all-encompassing approach to asset and corporate management. Mandaris has the expertise and the insight to do just that.

A comprehensive service for corporate and private clients

Mandaris is an international trust and consultancy company. We look after companies and prosperous individuals in Switzerland and abroad. Our Private Client Services range from legal and tax advice to inheritance planning and family office services, including the setting up and administering of companies, trusts, foundations and private label funds. Similarly, our Corporate Client Services encompass legal and tax advice, all aspects of accounting, corporate consultancy, membership of compliance and management boards and support for expatriates.

Good reasons for good results

Transparency in our invoicing and management activities is a high priority for us. Streamlined structures, short decision-making paths and continuous efficiency monitoring ensure that our services represent good value for money. This means that Mandaris can afford to pay special attention to detail in dealing with its clients' specific needs. Whichever of our wide range of services you opt for, and however you combine them, our work is always underpinned by legal requirements, industry-specific regulations and regular quality checks.

Private Client Services

The interests of a private individual or a group of individuals are always at the heart of our service: legal and tax matters, inheritance planning or setting up and administering companies.

Tax advice for private clients

Examining all the taxation issues on a national and international level constitutes an integral part of comprehensive asset planning. Our experienced specialists can show you ways to optimise both your privately-owned assets and those of your companies. We think about tomorrow today, which enables us to advise you on choosing the best framework for your tax planning – not only in Switzerland, but also abroad. We help private clients from abroad to take up residence in Switzerland

Corporate Client Services

For commercial companies, our services encompass advice on legal and tax issues, salary administration, accounting and corporate consultancy, advice on compliance, serving on management boards and providing fiduciary services.

Tax advice for companies

For us, taxes are not an impenetrable tangle, but a clear thread running through all our detailed planning. By analysing all aspects of taxation – both national and international – our experienced advisers and internal and external experts will explore the best ways of optimising the tax situation for your company. When choosing the best tax planning structures in Switzerland and elsewhere, we will also take account of your needs in

and negotiate tax agreements. Naturally, our services also include handling your tax returns and requests for reimbursement, checking your tax assessments and calculations, preparing objections and taking legal recourse and representing you in front of taxation and tax law authorities.

Inheritance planning

What you have built up can become a burden for you and your descendants unless you think seriously and in good time about inheritance and your legacy. Thanks to our forward-looking inheritance planning service, you need have no worries about the next generation. Handing over your private and business assets and dealing responsibly with your inheritance requires detailed knowledge, sensitivity and experience, especially in an international context – and our specialists

have been specifically trained in this. Several of them have a great deal of experience in setting up corporate structures such as foundations and British- and American-style trusts. Mandaris has a subsidiary which operates exclusively as a trustee.

Legal advice for private clients

Our legal experts can put a great deal of specialist knowledge in the field of asset management, matrimonial property law, inheritance law and international business law at your service. Drawing up marriage and testamentary contracts, wills and executor mandates, and dealing with the distribution of estates, Swiss and other company and contract law, fiscal and banking law are all important elements of this work. We are also happy to prepare expert opinions for you.

Interface between private and corporate assets

A company often represents a major part of the total assets of a private individual. We can act as your point of contact on all matters of investment and finance, while taking account of your private circumstances. We can assess your company, support you by producing feasibility studies and help you with setting up or buying/selling a company or property. We will monitor your holdings for you and can prepare shareholder commitment contracts and other contractual material.

Family office

Assets have to be looked after and organised on a daily basis, especially if some members of the family move abroad or your family's assets are in more than one country. Family governance and strategic planning for family members

and their assets then become critical if the family's assets are to be preserved for future generations. Our family office service spares you this demanding task. Thanks to our collective expertise and reliable contacts with well-known international specialists, we can work with you to find solutions that more than meet your needs. Our family office team delivers tailor-made services under one roof, helping you to restructure, manage and safeguard your assets – thereby relieving you and your family members of this burden.

the future. We can assist foreign companies with setting up a company in Switzerland and negotiating a tax agreement. Of course, our services also include handling tax returns of all kinds and claims for reimbursement, checking your tax assessments and calculations, preparing objections and taking legal recourse and representing you in front of taxation and tax law authorities.

Corporate consultancy and fiduciary functions

With our business administrators, accountancy and fiduciary experts, your finances are in safe hands. They will apply their technical knowledge and experience to organising your finance and accounting systems (financial, operational, debtor, creditor and payroll accounting, consolidation) or other company operations as effectively and efficiently as possible.

Management organisation, staffing, performance management, finance and investment matters, business appraisals and questions of social security or VAT all come within our remit. When it comes to financial constraints or divesting assets, we will be pleased to advise and assist you. We can help out by providing interim management services. In your business transactions, we can offer our services as fiduciary owner or escrow agent.

Instructed to act for corporate bodies

As a result of our many years of experience and knowledge of company law, we are familiar with the requirements for companies of all sizes and are happy to sit on management boards in Switzerland or elsewhere. Our closeness to our clients enables us to respect the special circumstances of family-owned companies. We will also act as administrators or liquidators

and play the role of mediators in achieving a successful outcome. If you are in the process of buying or selling a company, we can help you with the legal, financial and fiscal due diligence procedures.

Compliance

Do you lack the capability to handle the risks resulting from legislation on compliance and due diligence? Our Compliance Team will be happy to advise you if you wish to reorganise or strengthen your company's system of controls. We will handle all compliance issues for you, allowing you to keep risks under control and get on with the job.

Legal advice for companies

We will help you set up your company, apply for residence and work permits for you and represent you before the authorities. We can

advise you on legal issues such as how to draw up company and shareholder commitment contracts or employment contracts for your employees and managers, as well as expatriates. We will work with your legal advisers in other countries in the complex field of international business law. We will support you in converting your company to a different legal entity, relocating your head office in Switzerland or abroad, handling mergers, restructurings and liquidations.





A FINELY-TUNED TEAM

For us, people always take centre stage. Whether it's our clients or our employees – we treat them all as very special, thereby creating the basis for a harmonious long-term partnership. The daily interplay of technical and social expertise, a customer-focused approach and excellent communication allows us to provide high-quality services in a flexible and timely manner.

Experienced experts with personal commitment

Being able to contribute ideas, get involved and help with decision-making – these are the essential requirements for each and every member of our team if we are to achieve success – and that means customer satisfaction. For performance and efficiency, our employees need personal qualities such as dedication, flexibility, awareness of their responsibilities and the ability to work on their own initiative, sensitivity and the skills of a diplomat. Our teamwork always respects everyone's expertise and observes clearly defined areas of responsibility.

Trained to give outstanding performance

We do a lot for our employees too, because the happier they are, the more constructively they work as a team and the better the quality of the solutions they find for you. For us, creating a motivational working environment is as natural as being open in our communications and building up a contagious team spirit. We place great store on providing regular training and professional development in technical subjects and facets of management as well as in personal development.

PERFECTIONISTS SINCE 1933

Mandaris – formerly known as Experta – is one of the oldest international trust and consultancy companies in Switzerland and, by becoming independent, is equipping itself to face the future with confidence. As of May 2010, the members of the management board have taken over the limited company in a management buy-out and repositioned it. Originally founded in Zurich in 1933, the financial services company now operates from three centres in Basel, Zurich and Geneva, where its employees create innovative added value for discerning clients in Switzerland and elsewhere.

A traditional company, looking to the future

Since it was first established in 1933, our company has moved from being purely a fiduciary company to become a fully-fledged international consultancy company. It has always been of critical importance to spot new trends and seize opportunities – and this has opened up new partnerships, areas of business and markets for our company. At the same time, we have regularly thoroughly reviewed its strategy and structures and adapted them to suit changing market conditions – and this is an ongoing task. Mandaris today is in an excellent position from which to assert itself in a business world that is ever changing. We aim to be both reliable and flexible in partnering our clients into an exciting future, with a clearly-identified corporate culture and tried and tested business principles.

Commercially independent and committed to high standards

As an independent service provider we offer unbiased and valuable advice, focussing our work on processes not products, acting with prudence and foresight. The advantage that an owner-managed company has of not needing to take account of any overriding economic structures or interests gives us the freedom to provide our clients with services that are customised down to the smallest detail. At the same time, Mandaris operates according to quality standards that meet the highest standards in the financial sector – especially regarding compliance. The company is also under the direct control of the Federal Financial Market Supervisory Authority, FINMA. This means that our innovative solutions are always based on the latest statutes. Our close ties with the authorities in Switzerland and other countries help us to keep abreast of important trends and new developments and to set our course accordingly at an early stage.





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Private & Corporate Client Services