kaiser.partner

Brief information

Swiss Wealth Management for US clients

Switzerland: Stability, Expertise and Discretion

Switzerland is a traditional safe haven for securing and developing wealth.

These advantages attract clients from all over the world:
- political stability
- healthy economical development and stable currency
- strong financial service sector
- effective privacy codes

A new Generation of Offshore Wealth Management

Kaiser Partner Financial Advisors develops individual wealth management solutions for US clients. We are one of a select group of financial institutions outside the USA who can advise you as an American client. Our company complies with US and Swiss regulations, is registered as an investment advisor with the SEC (Securities Exchange Commission), and regulated by the Swiss Financial Market Supervisory Authority (FINMA), as well as the Swiss Association of Asset Managers (SAAM).

Taking legal and fiscal obligations into account, we provide all the advantages of offshore banking, while at the same time our reporting helps to support unworried communication with the taxman. For your flexibility, Kaiser Partner Financial Advisors cooperates with a range of prime Swiss and Liechtenstein Banks, custodying assets and processing transactions for our clients.

Asset Management: Made-to-Measure for You and Your Needs

Individual – global – tax-efficient. Understanding your personal financial situation and goals is the basis for creating and managing your personal investment portfolio. We apply a systematic investment approach and a best-in-class securities selection for the development of your wealth. Our clients often complement their wealth management strategy with our expertise, for example in multicurrency investments and international financial markets, while the US market is covered in other ways. When selecting individual securities, the tax aspects of our clients are taken into consideration.

Trust services for generations

Falling back on a heritage of 80 years of experience in this business, Kaiser Partner Financial Advisors designs trust services that help you develop your wealth for this and future generations.

Keeping track: comprehensive reporting services

In-depth reporting statements help you to control the level of risk of your investments and holdings, as well as to make sound decisions. We incorporate all the information necessary for filing your tax statements. Our main services include tax reporting, performance statements and consolidated statements.

Our pricing: competitive and transparent

Our fees cover asset management, custody and brokerage. Clients benefit from low brokerage fees, based on an institutional rate. If your assets are within a legal structure, there is a supplementary fee for the trust.

Assisting you with voluntary disclosure

For citizens who wish to regularize their tax filings with the IRS, we provide the following assistance services.

Forensic accounting: Identification of the information necessary to calculate the taxes owed, interest charges and penalties (if applicable).

Investment services: In contrast to other offshore wealth managers, our portfolios do not hold securities that could trigger tax-ramifications (e. g. offshore funds → PFICs). We help to adapt portfolios to the new situation.

Specialist network: Experienced lawyers and accountants support you in this important process.

For further information, visit www.voluntary-disclosure.com.

Contact

Kaiser Partner Financial Advisors Ltd.
Zollikerstrasse 60, 8702 Zollikon-Zurich, Switzerland
www.financial-advisors.ch
www.kaiserpartner.com

T +41 44 752 51 52, F +41 44 752 51 53
E financial.advisors@kaiserpartner.com

22.08.2011