

TAKE ADVANTAGE OF A CHANGING WORLD

# FAMILY OFFICE

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Family Governance  
Investment Structuring  
Wealth Management

Finance Legal Tax  
Business Consulting  
Digital Transformation



If you are looking for

Swiss Reputation  
Strong Currency  
Swiss Retirement  
Secured Assets  
Swiss Competence

You are in a good place.  
ASTON CONSULTING AG



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# ABOUT US

EXPERIENCE. PASSION. MOTIVATION. TEAMWORK.

Aston Consulting AG helps companies, families, institutions and people around the world, pursue their investing goals. We work only for our clients, who have entrusted us with managing in total CHF 100 million, earning the distinction of being trusted to manage worldwide investments. For your benefit, we offer a wide variety of products and services in order to meet your individual requirements.

**Consulting not only our inhouse investment specialists but also leading external professionals allows us to present you with an independent choice of the most suitable, competitive products and services.**

Prudent investment lies at the heart of creating and preserving wealth. This requires a great deal of time, experience and expertise. Our discretionary portfolio management centres on the client's needs, short and long-term goals and risk profile. These factors determine the nature and structure of your individual portfolio. In asset management, Aston Consulting AG is responsible for each individual step of the strategy implementation, from investment decisions to portfolio administration.

**Business, legal and financial advisory means more than just managing and structuring assets. It is about providing comprehensive advice, which includes professional expertise and empathy.**



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# WHAT IS FAMILY OFFICE?

MANAGEMENT OF FAMILY ASSETS AND INVESTMENTS

*The Rockefeller family first pioneered family offices in the late 19th century. Family offices started gaining popularity in the 1980s, and since 2005, as the ranks of the super-rich grew to record proportions family offices swelled proportionately.*



A traditional single family office is a business run by and for a single family. Its sole function is to centralize the management of a significant family fortune. A family office is a privately held company that handles investment management and wealth management for a wealthy family, generally one with over CHF 100 million in investable assets, with the goal being to effectively grow and transfer wealth across generations.

Family offices usually handle tasks such as property management, tax advisory, management of legal affairs, family management services, family governance, financial and investor coaching and private foundations. Family offices might invest in private equity, venture capital opportunities, hedge funds and commercial real estate. Advisory officers are compensated per their arrangement with the family, usually fix cost (standby) with incentives based on the profits or capital gains generated by the office.

# WHY SWITZERLAND?

REPUTATION. CURRENCY. RETIREMENT. TAX AND LAW REGIME.

A good family office will not only manage its clients' wealth, it will work above all to safeguard it, especially if the clients live in unstable countries. Consequently, location is an important factor when choosing a family office. It needs to be based in a very politically and economically stable country offering a wide range of quality services and first-rate infrastructure. The Swiss finance and banking sector is both unique and extremely carefree and buoyant. Switzerland has long been considered the world's leading financial centre for high net worth wealth management.

Over the last few years, it has also earned itself a strong reputation for currency and raw materials trading and fund management. Switzerland is politically and economically stable with a secure legal system, excellent financial services and a long tradition of private banking, insurance and independent wealth management. Swiss people are known for their competence in foreign languages, a central position in Europe, modern, reliable infrastructure and an ability to adapt to different cultures. Swiss law prioritises freedom, privacy and individual property.



The assets of foreigners are treated in exactly the same way as those belonging to Swiss nationals. Banking and wealth management are protected by bank secrecy laws, as defined in Article 47 of the Federal Law on Banks and Savings Banks. Switzerland has withstood various financial crises, thanks to consistent growth based on wide diversification and strong domestic demand. It has a very low level of government debt and is one of the last countries still holding an AAA rating. In addition, Switzerland has one of the world's highest standards of living. It has an attractive corporate tax regime. In certain cantons, tax rates are very low and the country has signed numerous double taxation treaties. The Swiss franc has consistently risen in value over recent years, has a long-standing international reputation as a safe-haven currency.

# HOW WE WORK?

CONSULTING. ADVISORY. FAMILY OFFICE.

1. Kick-off meeting, service requirements, target setting, KYC and risk profile
2. Contracting and advanced payment (50% of annual fee structure)
3. Status and evaluation, company restructuring plan, investment objectives and strategy
4. Holding structure, financial-tax-legal advisory, management reporting
5. Continuous asset and portfolio monitoring with dedicated consultant

Regular monitoring and standard reporting, your portfolio and strategy is reviewed and confirmed or, alternatively, it may be adapted if your requirements change.



# CONTACT US

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## SWISS REGISTRATION

CHE-296-444-126

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Capital at risk: The value of investments and the income from them can fall as well as rise and are not guaranteed. The investor may not get back the amount originally invested. Past performance is not a reliable indicator of current or future results and should not be the sole factor of consideration when selecting a product or strategy. Changes in the rates of exchange between currencies may cause the value of investments to diminish or increase. Fluctuation may be particularly marked in the case of a higher volatility fund and the value of an investment may fall suddenly and substantially. Levels and basis of taxation may change from time to time.

Equity risk: The value of equities and equity-related securities can be affected by daily stock market movements. Other influential factors include political, economic news, company earnings and significant corporate events. Counterparty risk: The insolvency of any institutions providing services such as safekeeping of assets or acting as counterparty to derivatives or other instruments, may expose the Fund to financial loss.

Liquidity risk: The Fund's investments may have low liquidity which often causes the value of these investments to be less predictable. In extreme cases, the Fund may not be able to realize the investment at the latest market price or at a price considered fair.

Exchange rate risk: The return of your investment may increase or decrease as a result of currency fluctuations.