

TAKE ADVANTAGE OF A CHANGING WORLD

# FAMILY OFFICE

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Family Governance  
Investment Structuring  
Wealth Planning

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 swiss company set up and wealth planning goals. For your benefit, we offer a wide variety of financial, legal, accounting and tax advisory 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.**

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?

FINANCE. ACCOUNTING. LEGAL TAX. WEALTH PLANNING.

*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 highs.*



- 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 private company that handles all legal, tax and accounting services, business and startup consulting, structuring, wealth planning for a wealthy family over CHF 100M+ in assets, with the goal being to effectively grow and transfer wealth across generations.
- **We serve our worldwide clients with structured solutions between CHF 1-100 M sales revenue in the swiss operating, holding or startup company.**

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. CONSISTENT 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**.

# SWISS COMPANY

OPERATING. HOLDING. STARTUP. COMPETENCE AND EFFICIENCY.



## ADVANTAGES

- Foundation and register of your swiss company in Canton Zug
- Registered office (domicile), representation (director), secretary services, mail management
- Financial, legal and tax advisory, accounting, closing, reporting, project management, rental/housing
- Setting up competence center, evaluation of assets, reorganisation, restructuring
- Patenting/protecting intellectual property rights
- Targeting competitive one digit (5-9%) all-in taxation level

## FEE STRUCTURE

- Annual Family Office Service Fee (portfolio based, min. 49k CHF)
- Share capital (CHF 100k), third party markup 5-20%, negotiation bonus 10%
- Finance, legal, tax, accounting/payroll, financial closing/reporting fee amounting to CHF 500 per hour
- Business advisory, startup consulting, project management fee amounting to CHF 400 per hour
- Administration, mail forwarding, other misc/organization related fee amounting to CHF 300 per hour

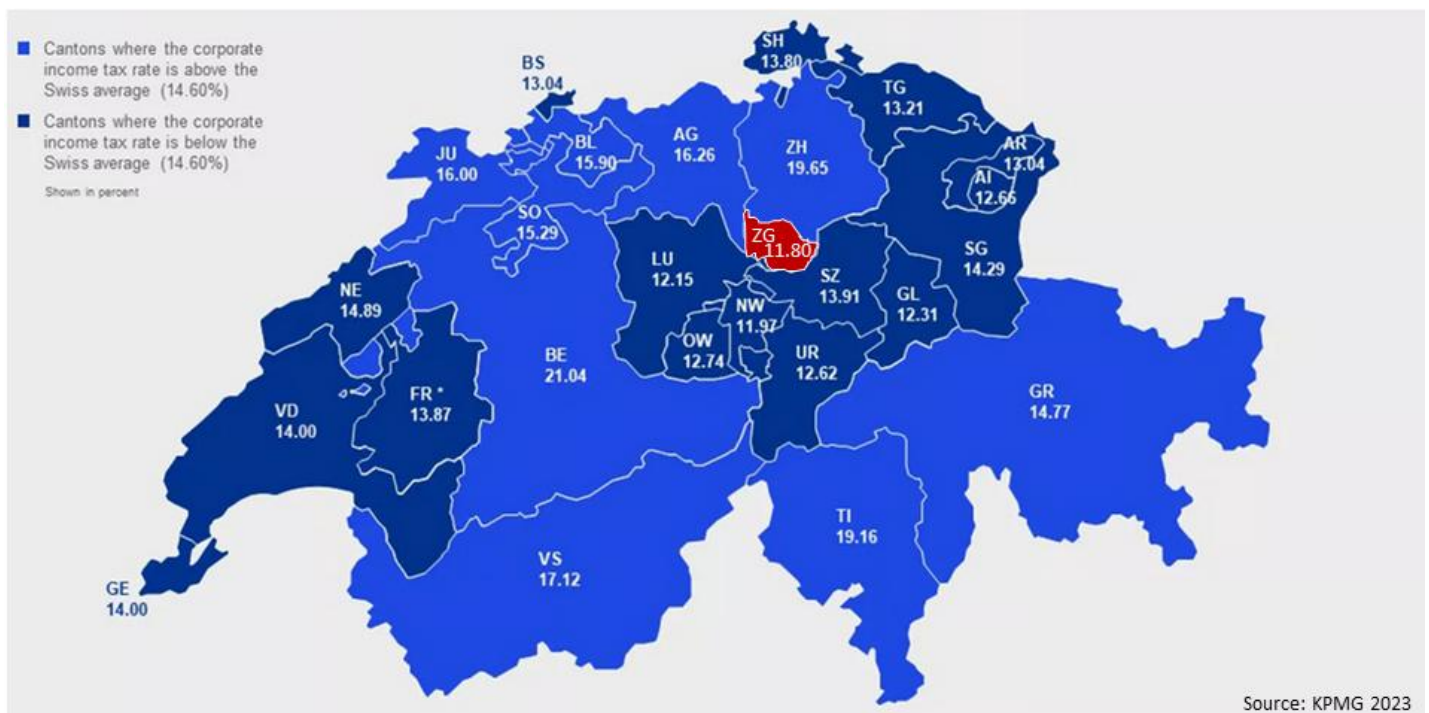
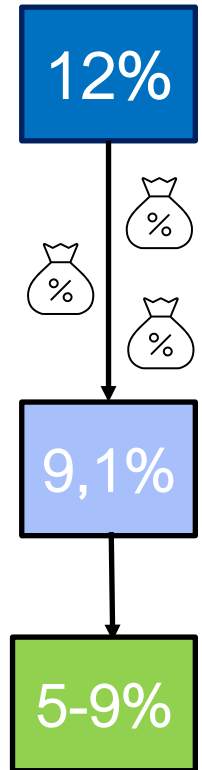
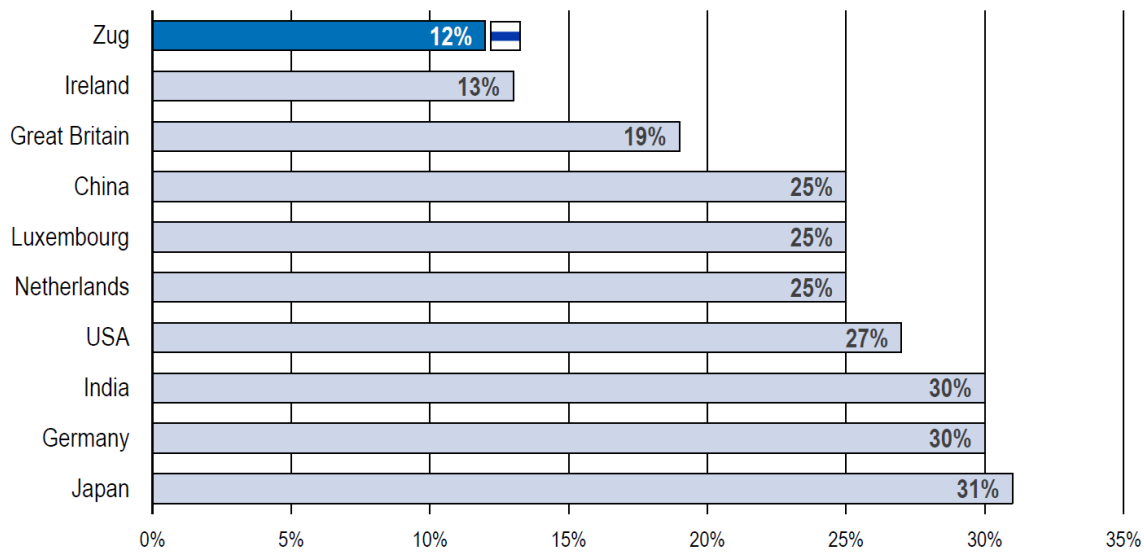
Personal healthcare/insurance (CHF 300-500/month), flat/housing rental expense (CHF 3-10k/month)

# TAX PLANNING

CONSULTING. ADVISORY. FAMILY OFFICE.

Kanton Zug

## Corporate profit tax - international comparison (ordinary tax rate)



# HOW WE WORK?

CONSULTING. ADVISORY. FAMILY OFFICE.

1. Kick-off meeting, service requirements, target setting, fee structure, KYC
2. **FAMILY OFFICE PACKAGE**
3. Contracting and invoicing 50% of annual advisory fee (capacity reservation)
4. Strategy, Milestones, Client Portfolio Structuring, Tax/Payroll planning, Evaluation
5. **START AND OPERATION**
6. Setting up swiss company, domicil and bank account, implementing business strategy
7. Financial closings, management reporting, tax planning, budgeting, rolling forecast, sensitivity analysis based on client requirements and family office package.



# CONTACT US

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## SWISS REGISTRATION

CHE-296-444-126

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# Appendix

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# KNOW YOUR CUSTOMER

CLIENT NAME: .....

COMPANY NAME: .....

## SWISS COMPANY

- Swiss company (AG incorporation, CHF 100k share capital)
- Main activities / sector / country / turnover:
- Estimated NET SALES (M CHF) in Switzerland:
- Business specific OPEX categories:

## DOMICILE

- Registered swiss office in Zug, Kanton Zug
- Registered swiss office in Zurich, Kanton Zürich
- Registered swiss office in Luzern, Kanton Luzern

## OWNERSHIP

- Ultimate beneficiary owner(s)

Name ..... ownership % .....

Name ..... ownership % .....

Name ..... ownership % .....

Name ..... ownership % .....

- Indirect ownership via registered legal entity or asset manager (please specify)

- Politically exposed person (PEP)

# KNOW YOUR CUSTOMER

DIRECTORSHIP	
• Director is the owner of the swiss company	
• Directorship service (swiss registered private person)	
• Directorship via registered legal entity or asset manager (please specify)	

BANK ACCOUNT & ACCESS	
• Currency specific bank accounts (CHF), others please specify: <input type="checkbox"/> EUR <input type="checkbox"/> USD <input type="checkbox"/> other:	
• Bank account access including 100% sole signature right for company OWNER	
• Bank account access including JOINT signature rights for owners (please specify)	
• Bank account access including 100% sole signature for company DIRECTOR	
• Bank account access including JOINT signature rights for company directors (please specify)	
• Digital banking access for owner(s)	
• Digital banking access for director(s)	