



Financial planning

At swisspartners, we know the many different facets of life. Very often, financial matters are also the origin or consequence of this. It is therefore all the more important to analyze the various components in good time and to plan correctly. We support private individuals and entrepreneurs in the various subject areas and can draw on many years of experience.

swisspartners Financial Planning offers you complete financial support for a wide range of needs. An excerpt from our solution-oriented and customized approaches:

- Long-term liquidity and asset planning
- as a basis for decision-making (retirement, sale of company, acquisition | sale of real estate, inheritance, change of residence, etc.)
- Comprehensive tax planning; optimization by means of pension options, change of domicile, taxation of pension assets
- Estate planning | execution of wills incl. advance care directive
- Asset organization; adapting the asset structure to the various phases of life
- Support in the implementation and realization of various solutions

Locations

We are happy to be there for you personally at our locations in Switzerland and Liechtenstein:

swisspartners AG
Am Schanzengraben 23
CH-8002 Zurich

swisspartners AG
Stadtle 28
FL-9490 Vaduz



Your contact person

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