

Innovative perspectives for a holistic financial impact



Holistik
wealth planning



Your benefits

- Agile and forward-thinking
- Cross-disciplinary team and trusted network
- Holistic approach avoids counter-productive effects of separate actions
- Time gain and financial optimisation

Life planning is more than a one-off exercise

From cross-jurisdictional assets to multi-generational planning amidst intensifying tax regulation, a holistic approach to advising families and businesses adds significant value and achieves better outcomes.

Our role is to know the opportunities, measure risk and manage uncertainty.

Life is a journey: our cross-disciplinary services exist to assist and guide through all scenarios.

Consulting with perspectives turns a situation into options



Multi-jurisdictional wealth planning

Swiss and international asset protection and wealth transfer

Life insurance and company solutions

Retirement and succession planning

Financial plans and projections with various scenarios

Domestic and cross-border relocation

- tax and legal services (ordinary vs lump sum regimes, permits & Swiss authorities)
- family office services (schools, insurance, accommodation, etc)

Pension structuring for private clients and companies, including

- international relocation
- board of trustees

Sustainability & impact investing

Blockchain technology and digital assets.



Relocation



Pension



Sustainability & Blockchain



Trang Fernandez-Leenknecht, Partner

Latest news

Holistik holds a conference on "From Responsible to sustainable to impact investing", The United Nations, 4th Annual International Conference on Crowdfunding and Smart Finance, December 2019

Holistik debates about the "Automatic exchange of financial information in tax matters: and the crypto-assets?" Swiss Institute of Fight against Economic Crime, October 2019.