

Innovative perspectives for a holistic financial impact



Holistik
wealth planning



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, that include the effective implementation and the realisation of your objectives.

We are dedicated to driving positive change for better business and family goals, focusing on sustainability as a value-driver in growth, brand, strategy, and people.

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 (incl. transfer pricing)

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 & Corporate clients, including

- international relocation/consolidation
- board of trustees

Tax and regulation on sustainable investing and philanthropy

Tax and regulation on Blockchain-based, digital assets ('crypto')



Relocation



Pension



Sustainability & Blockchain

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



Publications



Events

Why Impact Investing Will Go Mainstream and Evolve to Suit European Investors – international regulations alongside the European Action Plan on sustainable finance, Trang Fernandez-Leenknecht, The Global Handbook of Impact Investing, Wiley Global, December 2020.

Holistik co-chairs two days "Impact investment, Donations & Philanthropy" and "Smart Finance & Cryptocurrencies", 5th Annual International Conference @ The United Nations, December 2020.

Regulatory and tax issues of "Automatic exchange of financial data: and the crypto-assets?" Swiss Institute of Fight against Economic Crime, October 2019.



A client case :

Relocation from A to Z

A double national couple (Canada and UK), three children, works and lives in two different countries in Asia. The family plans to move to Switzerland. The children will benefit from Switzerland's excellent schooling system, the father will retire in a few years while the mother will keep working between Europe and Asia.

Legal & Tax

Family office

Pension

Benefits

Coordination with the experts from the home country

For every member of the Family

World class schools within one hour from an international airport

One contact point for all requests

Team of experienced and qualified professionals



Services

26 cantons, 26 tax and law systems

Tax calculation and negotiation of ordinary and lump sum regimes

Selection of optimal domicile

Permits and formalities with the Swiss authorities

Property purchase / rental / financing

Schools, concierge, personal administration

Health, mandatory and private insurance

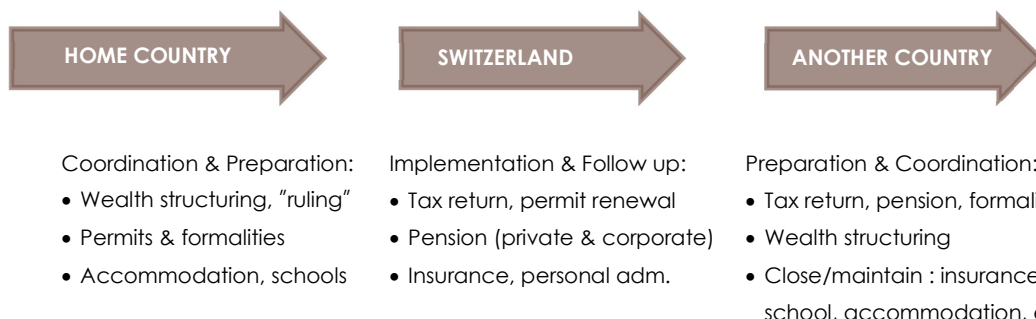
Tax return and legal services incl. renewal of regimes

Financial and succession planning

Asset holding vehicles

Financial plans with cash flows according to Swiss standards of living

Pension consolidation between the previous and new home countries



Trang Fernandez-Leenknecht

CAIA, LL.M International taxation

Trang was Director Wealth Planning Switzerland in a leading private bank, and Vice Chairwoman of the Council and a member of the Investment Committee of a US\$ 1 billion pension fund. Trang co-chairs the conferences on Smart Finance @ the United Nations and is a judge at a global accelerator for high impact startups.

Holistik SA

Dedicated to driving positive change

Holistik is an entrepreneurs-led tax and legal consulting boutique. We advise private clients and companies in cross-jurisdictional wealth planning, international tax incl. transfer pricing, family relocation, pension and succession planning, tax and regulation on Sustainability & Blockchain.

