



[www.switzerland-family-office.com/support.html](http://www.switzerland-family-office.com/support.html)

## **Our services**

**FOSS Family Office Services Switzerland (FOSS) supports you in your search for and choice of a family office (in Switzerland) that best suits your needs. Alternatively, we assist you in changing family offices, in case you are dissatisfied with the services you are currently receiving, or have outgrown your current advisor.**

### **How do we support you?**

Choosing a family office or setting up your own is not something you can decide on or do overnight. The selection of your wealth advisor is an extremely serious issue. Which family office is good (for you)? Do you know which questions to ask when visiting a multi-family office for the first time? And does this particular provider deliver an integrated service or does it only purport to? FOSS helps you with your search for and selection of a suitable as well as high-quality family office.

FOSS is a part of Union Bancaire Privée, UBP SA (UBP). FOSS's services are provided fully independently from any family office or independent asset manager. FOSS is not a family office itself and neither FOSS nor UBP offer any in-house family office services. We therefore have a clear, independent and 100% objective view of the service level provided by all multi-family offices in Switzerland. Using our unique selection and mapping process we have, over the past years, built a database containing the key features of over 200 different multi-family offices in Switzerland. Every family office in our database is categorised with respect to, for example, size, language capabilities, focus markets, investment services offered, whether they work with in-house or external specialists, cost structure, consolidated reporting capabilities, wealth planning services, years of experience, etc. Thanks to our sophisticated evaluation process of your family's needs in combination with the data from this sizable database, we are able to successfully support you in finding the right family office in Switzerland.

**Our 4-stage process in short:**

1. After you have contacted us we organise a face-to-face meeting with you (and/or your advisor) in Switzerland in order to analyse and map, based on our unique evaluation process, your and your family's specific needs with regard to a family office;
2. Based on these requirements we draw up a shortlist (of 3 or 4) of the most suitable high-quality family offices that offer the exact services you are searching for;
3. Subsequently meetings with the selected family offices are organised by us and, jointly with you (your advisor) and/or the family (representatives), we visit each one. During these visits we focus on selecting the multi-family office with the services (and accompanying cost structure) that best fit your and your family's needs;
4. Afterwards we jointly analyse the meetings, and ultimately you select the right/best family office for you and your family.



**A unique offering**

FOSS is currently the only service-provider in the world offering this kind of tailor-made assistance to families who are trying to find the right multi-family office. Our years of experience have also given us the ability to:

- ◆ Act as sparring partner for families setting up their own single-family office in Switzerland.
- ◆ Help you find another multi-family office if you are unhappy with the services provided by your current one, in Switzerland or elsewhere in the world, or when you have outgrown your current advisor.
- ◆ Support families in finding another Trustee for their Trust, following a similar process.

You will find more about our team here. Feel free to contact us; we look forward to assisting you in finding the right family office that exactly matches your needs.