

# TREUCO

TRUST & CARE

## Philanthropy



We jointly define and implement your philanthropic goals and your individual strategy. Based on our experience we support you in your charitable undertakings and help you carry them out successfully.

### How We Assist You

Philanthropy starts with an analysis of your personal values and beliefs. Based on your intentions, we jointly develop an individual profile for your philanthropic activities.

Using this profile we develop a suitable implementation strategy from goal definition to performance measurement. Our advice facilitates the process of choosing projects or assists you establishing your own foundation.

### Your Advantages

With our extensive network and long-term experience we know of diverse and practical projects and help you to employ your wealth for a meaningful and permanent value creation.

We place great emphasis on our employees making personal contributions – such as acting as a foundation member or as a trustee. This makes them reliable and experienced partners for an effective implementation of your philanthropic strategy.

## Our Services

We accompany you in your philanthropic endeavours with comprehensive advise. We identify suitable projects and evaluate, implement and administer the appropriate legal structures for your plans with a selection of choices that is aligned with your values and interests.

- Analysing and developing your personal philanthropic profile.
- Evaluating possible activities from donations to developing a specific foundation or trust.
- Assisting in identifying and developing projects.
- Developing the implementation and financing strategy.
- Establishing, managing and advising on Swiss or foreign charitable foundations or trusts (incl. drafting all founding documents).
- Revising and submitting tax exemption requests for foundations as well as applications for seals of approval (e.g. Zewo Certification).
- Comprehensive administration of foundations and trusts (incl. management, accounting in accordance with various standards, preparing financial statements, payment transactions and all other tasks).
- Coordination with the authorities.
- Offering a domicile to foundations.
- Support to identifying and appointing foundation members, trustees or protectors.
- If desired, active commitment of our employees as foundation members, trustees or protectors.