

Merco Trustees Ltd in Zurich receives a licence as professional trustee

Merco Trustees Ltd in Zurich, which is part of the international ATU group, has recently been granted the trustee licence pursuant to the Financial Institutions Act (FinIA) by the Swiss Financial Market Supervisory Authority (FINMA).

The ATU group (Allgemeines Treuunternehmen) is an internationally operating trust enterprise with its headquarters in Liechtenstein and established local networks at a global level. The ATU group provides the following services in particular:

- Holistic asset structuring and estate planning across generations
- Formation and management of foundations, trusts and companies (incl. bookkeeping)
- International tax consulting and tax planning ensuring a sustainable tax strategy:
 - Tax optimisation based on the Double Taxation Agreement (DTA) between Liechtenstein and Switzerland
 - Reduction of taxation in third countries by using the DTA network of Switzerland (Switzerland has concluded DTAs with more than 100 countries)
- Providing advice in case of a change of registered office or residence (flat-rate taxation)
- Providing advice with regard to, and formation of, tax-exempt charitable foundations based in Zurich (Zurich as a favourable location for foundations was strengthened by the Government on 1 February 2024)

The interaction between the long-standing expertise of the Liechtenstein headquarters and the subsidiary in Zurich makes it possible to offer the clients fiduciary services of the highest quality from one source. In this regard, the favourable laws of Liechtenstein play an important role, because they ensure an optimal global asset protection for the clients (legal provisions on contestation and statute of limitations with regard to creditor protection, inheritance and donations).

“We are proud that we have received the licence as professional trustee for our group company in Switzerland” says Dr Jürg P. Brinkmann, Managing Director of Merco Trustees Ltd. “We are looking forward to continuing our fruitful collaboration with our clients and to making a contribution to their continued growth and success”.

For further information please contact Dr Jürg P. Brinkmann (juerg.brinkmann@atu-ch.com) or your client manager.

Yours sincerely,

Allgemeines Treuunternehmen

The content of this ATU information letter is for general information purposes only and does not constitute legal advice.

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