

A photograph of three business women in a meeting. One woman is seated at a table with a laptop, another is standing and holding a pen, and a third is partially visible on the right. They are all smiling and engaged in conversation. The background shows a modern office interior with a window and a plant.

## Factsheet Relocation to Switzerland

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**transforma**consulting

solutions for people, companies & entities

# Relocation to Switzerland

## Services of Transforma Consulting

### PLANNING

- Analysis of actual tax and legal situation in home country with tax adviser of client
- Discussion of possible relocation locations (countries, regions of Switzerland)
- Search and choice of domicile
- Search and choice of schools/day-care facilities
- Search and choice of housing/real estate
- Analysis of future legal and tax situation in Switzerland (e. g. regular or lump sum taxation, development of business case and business plan, set up of Co.)
- Negotiation with the Swiss tax authorities (e. g. ruling for lump sum taxation)
- Analysis of pension schemes, life insurances, stock option plans etc.

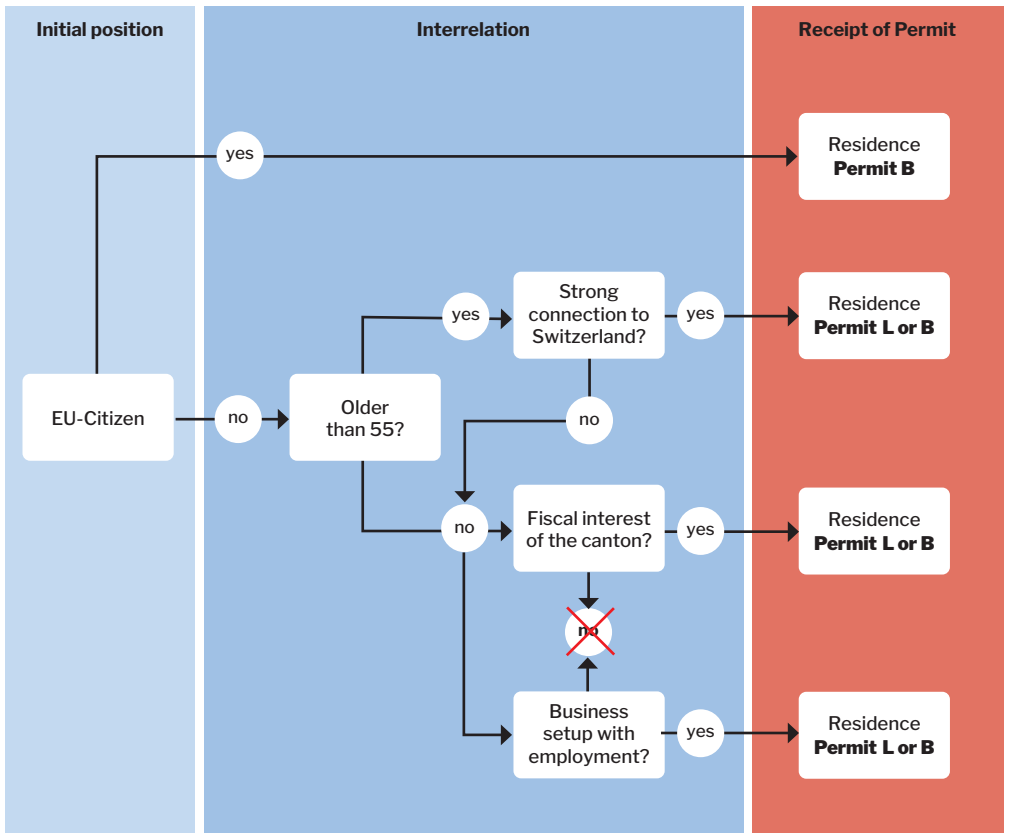
### MOVING

- Set up of company if necessary
- Application for Swiss residence permit
- Application for Swiss work permit
- Social security registration
- General assistance with authorities
- Assistance with the search and choice of insurances (health, third party liability, household, car etc.)
- Purchase of real estate
- Assistance with clearing formalities for household goods
- cooperation with asset manager for portfolio and wealth structuring
- Search and choice of investments into operative companies

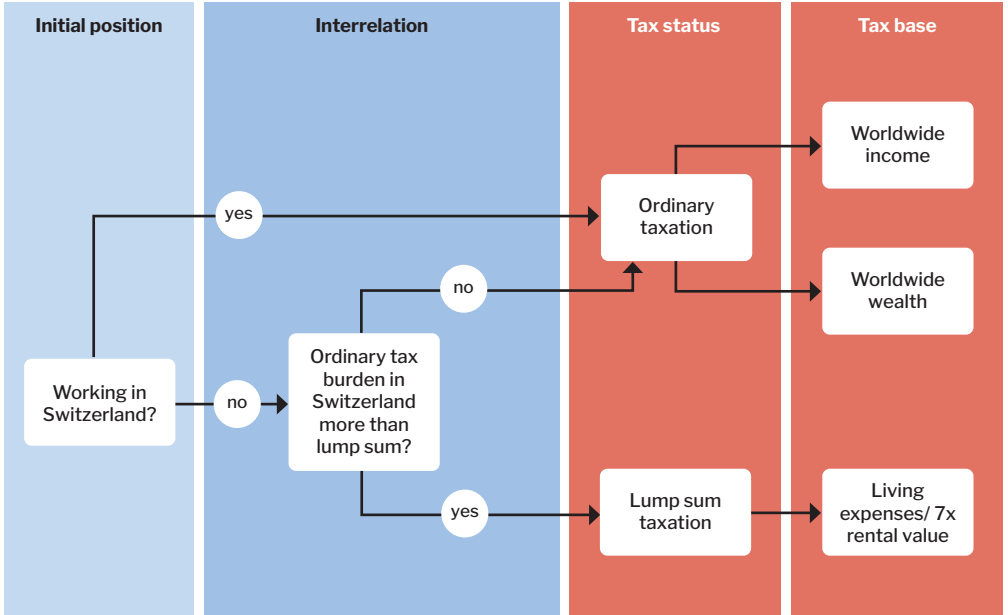
### INTEGRATION

- Introduction to medical system
- Concierge services
- Assistance with school matters
- Annual Swiss tax return
- Review of income and asset structures in cooperation with asset manager
- Succession planning according to Swiss law/foreign law
- Prolongation of residence permit
- Purchase of second home in Switzerland
- Retirement planning

# Residence Permit

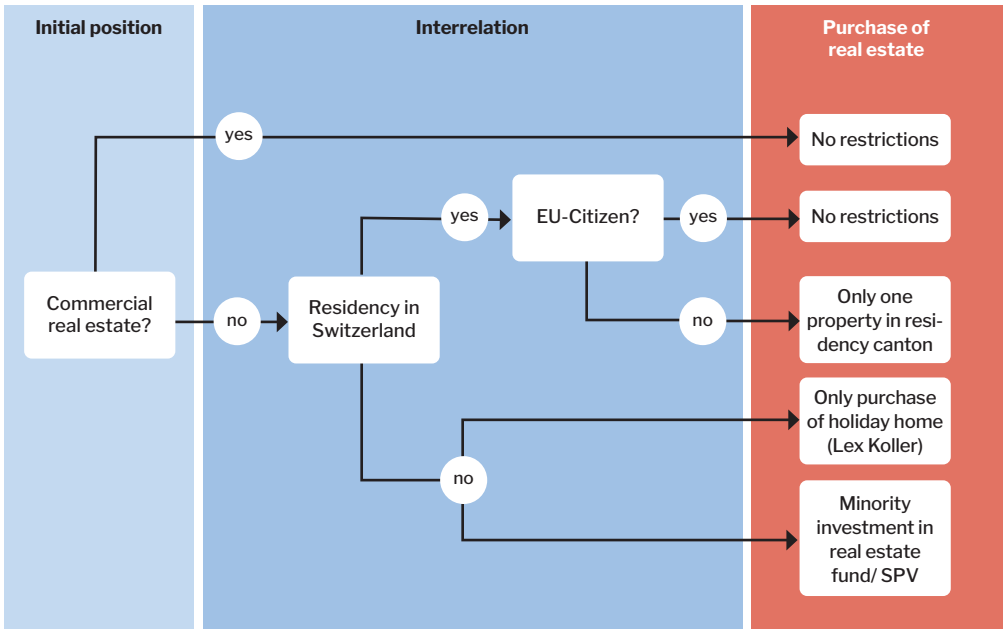


# Taxation in Switzerland



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# Purchase of real estate in Switzerland (Lex Koller)



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