



ASSET SUCCESSION

We speak your language.
Everywhere.

AUSTRIA BELGIUM BULGARIA CHINA CZECH REPUBLIC FRANCE
GERMANY HUNGARY ITALY POLAND ROMANIA SLOVAKIA SPAIN TURKEY



SAFE INTO THE NEXT GENERATION WE CREATE CLARITY

You do not yet have any succession planning and do not know who will receive your assets after your death? Is your family sufficiently protected? Our experts will advise you comprehensively on the design of your succession solution.

Asset Succession: Responsibility for the future?

The topic of asset succession is sensitive and is often avoided because it often involves difficult inheritance decisions. However, it is not only necessary, but can be financially beneficial and emotionally liberating to arrange the asset succession in good time.

Safe into the next generation

Giving your worldly goods to your nearest and dearest in a prudent and fair way - that is the challenge in everyone's life. Starting from a consideration of your family and property situation, we support you in concretising your wishes and your individual requirements. Our aim is to work with you to develop and implement the best possible structuring of your asset succession, taking into account the legal implications.

asset succession taken care of: a calming feeling

We help you with this and ensure that your assets pass safely on to the next generation and that your retirement provision is not neglected either. Our comprehensive advice covers all aspects relevant to you, in particular inheritance, civil, family and corporate law.

Among other things, we offer you the creation of

- gift and transfer agreements
- wills
- waiver of compulsory part contracts
- legacies
- powers of attorney
- successor solutions under corporate law
- living wills
- private foundations



FOR PRIVATE INDIVIDUALS, FARMERS, SMALL AND MEDIUM-SIZED BUSINESSES

The regulation of asset succession requires a thorough and sensitive treatment of your personal wishes, taking into account the legal possibilities that exist for this. Our related work is efficient and thorough. This allows us to find an optimal solution for you and your asset successions.

We put together your personal pension package in 5 steps

1. In a confidential **initial meeting**, we obtain an overview of your existing financial circumstances, your family structure and any existing succession ideas on your part
2. All the information obtained in the initial consultation is legally analysed by us and a **Asset succession concept** with the necessary documents (will, bequest, contracts under corporate law, etc.) is drawn up on the basis of the findings obtained.
3. We will send you our concept together with **certificates** and accompanying declarations.
4. If necessary, we can explain further details in a **personal meeting**.
5. Afterwards, the documents are initialised, signed and archived for you in our customer portal. We can also take care of any **notices and registrations for you (e.g. register of wills)**.

Should you wish to change your asset succession concept over time, we are available to you at any time to do so.



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Please note: The explanations above do not claim to be conclusive. They are only intended to provide initial information and orientation. They do not replace detailed legal advice. We are at your disposal for such a consultation.