

# THE POWER OF BEING UNDERSTOOD

AUDIT | TAX | CONSULTING



## FAMILY WEALTH AND SUCCESSION SERVICES

RSM Tax & Accounting Luxembourg



## FAMILY WEALTH AND SUCCESSION SERVICES

### Today's requirements

Because of the uncertainty and the volatility of the global economy today;

Because everything is fleeting and nothing is definitively acquired;

Because anyone responsible wishes to protect and preserve the future of their children, grandchildren, or an esteemed person;

It is essential to be very cautious and well-prepared when it comes to private wealth transmission.

### How we can serve you

With over ten years' experience in serving a prestigious private clientele, our reputation is well established in the field of wealth structuring and succession planning.

We have experience as well as the right tools required to assist families, whatever their needs and the value of their fortune.

As the world is changing fast, we have to be alert and cautious when seizing the opportunities for optimal succession planning.

### Our services are specific and tailored for each of our clients:

- We perform a full analysis of the family's situation and expectations.
- We examine all legal, accounting and financial documents.
- We determine a restructuring program according to your organisational needs.
- We define a step plan with the client and monitor the legal, financial and tax aspects of the project.
- Finally, we check and secure the transmission of the restructured wealth to future generations.

### What we offer

- Tax advisory services and wealth solutions,
- Independent bookkeeping,
- Preparation of consolidated reporting,
- Independent calculation and tracking of asset managers' performance,
- Detailed portfolio reporting,
- Family office services

We thoroughly examine all the alternatives and direct our clients to the most suitable solution in light of their personal situation.

Thus, we enable them to prepare for the future and guide them constantly in pursuing their goal to develop and enhance the wealth for the future generations.

**RSM Tax & Accounting Luxembourg**

**RSM Financial Services Luxembourg**

**RSM Audit Luxembourg**

**RSM Cosal Luxembourg**

6, rue Adolphe, L-1116 Luxembourg

B.P. 908, L-2019 Luxembourg

T (+352) 26 97 97 1

F (+352) 26 97 97 34 60

[www.rsm.lu](http://www.rsm.lu)