Swiss Trust & Fiduciary Services

by SFO TRUST AG

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In Proud Collaboration with
Absa Private Wealth Banking

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Management is doing things right;
Leadership is doing the right things.

Trusteeship means doing what's right for those who trust in you.

— Peter F. Drucker

Your Global Fiduciary & Wealth Structuring Partner

SFO Trust AG ("SFO") is a Swiss-based FINMA-regulated trust company specialising in bespoke fiduciary, trust, and wealth structuring solutions for high-net-worth individuals and families worldwide. Headquartered in Zurich, we leverage Switzerland's financial stability and legal framework to offer tailored fiduciary, wealth protection and estate planning services.

Our expertise extends to cross-border wealth management structures, particularly between Switzerland and South Africa, where we assist clients in offshore structuring, exchange control compliance, and tax-efficient wealth planning. Whether you require a trust, foundation, or corporate structure, our team ensures tailor-made advice, seamless administration, full regulatory compliance, and long-term asset protection.

SFO Trust AG is committed to confidentiality, integrity, and precision, ensuring that your wealth is structured strategically and safeguarded for future generations.

Why choose SFO Trust AG?

Swiss Excellence & Global Expertise

Combining Swiss financial security with deep international structuring knowledge.

FINMA-Regulated

Ensuring compliance with the highest regulatory standards.

Cross-Border Structuring Experts

Deep understanding of international legal, tax and regulatory landscapes.

Confidentiality & Security

Swiss privacy laws ensure the highest levels of discretion.

Bespoke Wealth Solutions

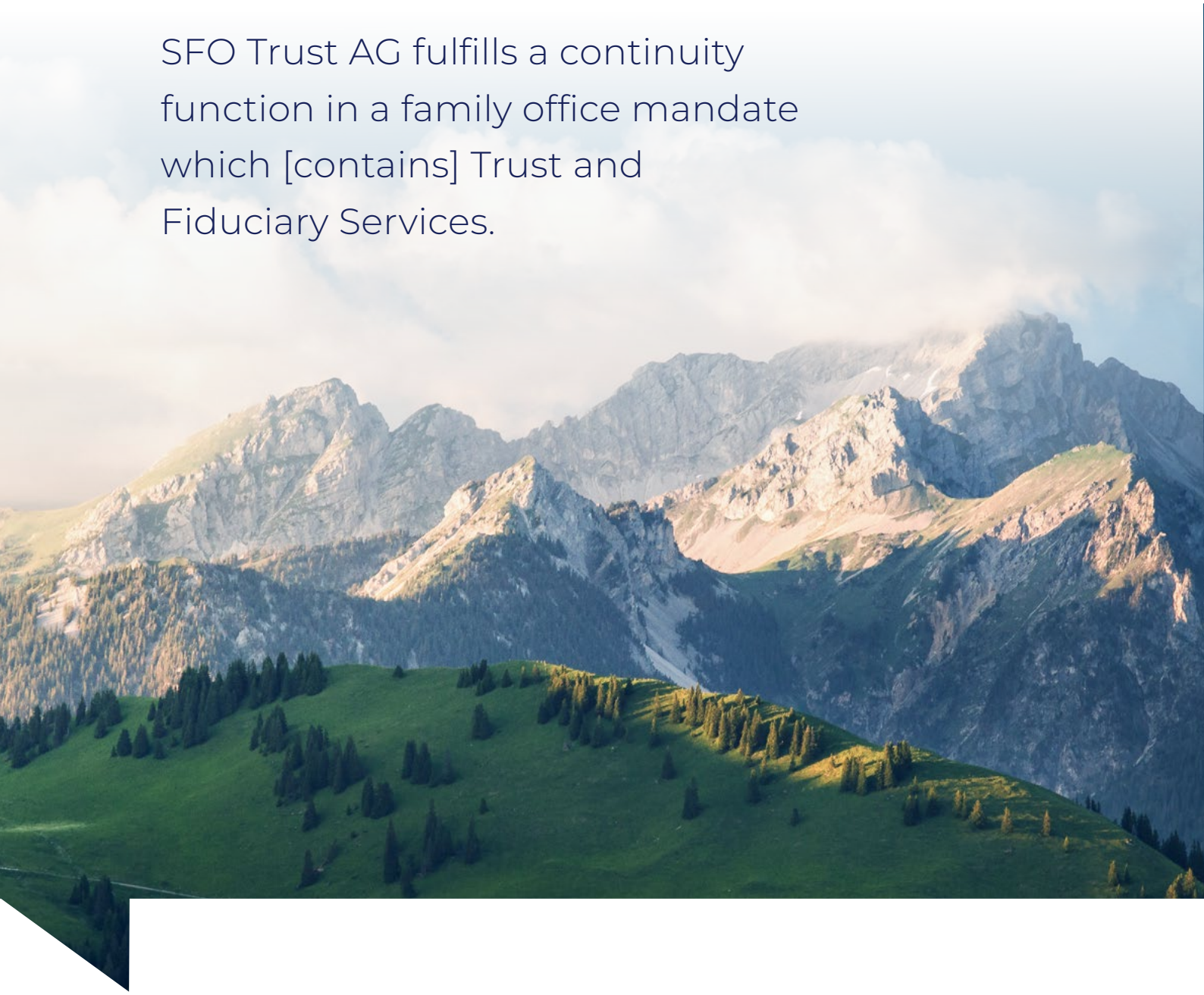
Tailored trust, foundation, and company structures for your unique needs.

Long-Term Partnerships

Building trusted relationships with clients and their families.

Why SFO Trust AG

SFO Trust AG fulfills a continuity function in a family office mandate which [contains] Trust and Fiduciary Services.



Continuity is about the ongoing ownership of assets and maintaining the infrastructure that holds the assets of a family. It also positions **Offshore Trust & Fiduciary Services**, which SFO Trust AG offers in Switzerland with global family office clients in South Africa.

Continuity is a key principle in focus for wealth preservation.

Key Individuals

Edwin Schmidt

BA LLB; MBA (STELL); CFP

Edwin is a founding member of SFO Trust AG. Previously, he played a key role in establishing a leading private bank in South Africa, where he led the Group's Family Office and later served as Vice Chairman after its acquisition by a global banking group. In 2001, he founded SFO Family Office, a specialised unit dedicated to holistic global wealth management for high-net-worth individuals and their families. Today, Edwin continues to serve as a trustee and advisor to prominent global families.

Dr Georgia Fotiou

DR. IUR. ATTORNEY AT LAW, TEP

Georgia is a director of SFO Trust AG. She advises private clients on the planning and establishment as well as the administration, restructuring and liquidation of international and national asset management structures. She is a proven and experienced expert in trusts and foundations. She also advises clients on all aspects of national and international tax law. Her other areas of practice include inheritance law, contract law, private international law, the settlement of persons in Switzerland and the provision of family office services.

Gerrit Schmidt III

MASTER OF SCIENCE (MSC)
IN BUSINESS SCIENCE

Gerrit is director of SFO Trust AG and serves as a trustee and wealth manager to private clients, focusing on multigenerational families. In addition to his corporate responsibilities as the business to business representative for SFO, he is Head of Family Governance Research and works within the banking sector providing training and thought leadership in family governance.

Yasemin Varel

ATTORNEY AT LAW

Yasemin advises national and international clients primarily in the areas of commercial and corporate law, contract law and public procurement law. Her other activities include membership of the board of the Swiss Turkish Lawyers and Jurists Association (STAJ).

Our Approach

At SFO Trust AG, we adopt a strategic and client-centric approach to wealth structuring, ensuring that every solution aligns with your long-term personal and financial objectives.

Tailored Structuring

We craft customised trust, foundation, and corporate solutions to align with your family's financial goals.

Generational Wealth Planning

Helping families establish robust succession planning strategies.

Regulatory Compliance

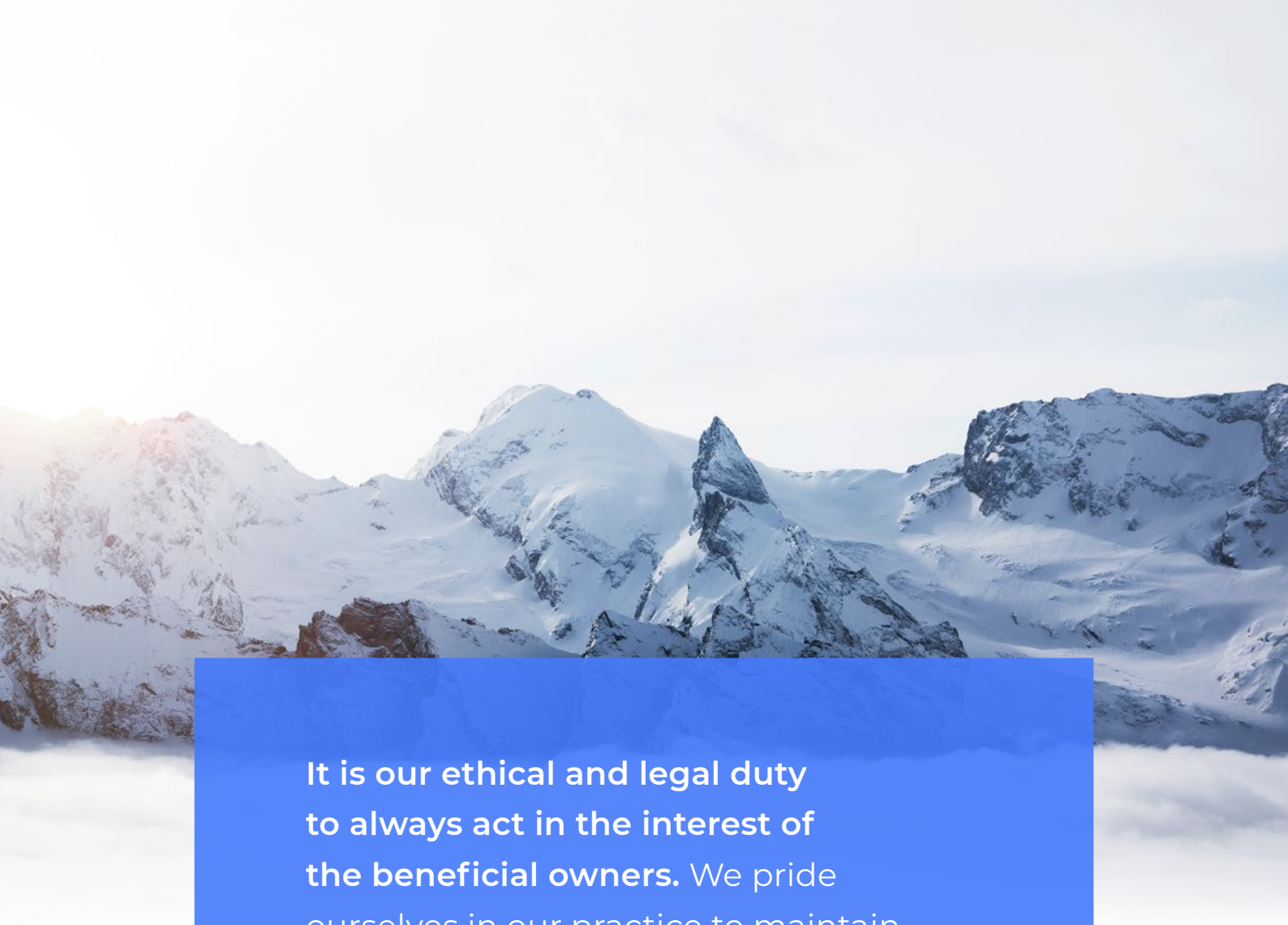
Ensuring adherence to Swiss, South African, and international tax and exchange control regulations..

Confidentiality & Governance

Upholding the highest standards of discretion and fiduciary oversight.

Multi-Jurisdictional Expertise

Managing complex cross-border financial structures efficiently.



It is our ethical and legal duty to always act in the interest of the beneficial owners. We pride ourselves in our practice to maintain the highest standard of care and our ability to balance the trustee and trust administration processes with our responsibility to act in the interest of beneficiaries.

Our Services

At SFO Trust AG, we adopt a strategic and client-centric approach to wealth structuring, ensuring that every solution aligns with your long-term personal and financial objectives.

Trust & Fiduciary Services

Establishment and administration of trusts and foundations tailored to wealth preservation, estate planning, and succession strategies.

Asset protection solutions ensuring long-term financial security across multiple jurisdictions.

Family Office Services

Comprehensive family office solutions, including investment governance, estate management, and philanthropy planning.

Multi-generational wealth planning and asset consolidation.

Company Formation & Administration

Structuring and managing Swiss and international corporate entities.

Cross-Border Wealth Structuring

Advising on international wealth management structures, including tax-efficient investment vehicles.

Expertise in offshore planning for expatriates, business owners, and international families.

Asset Protection & Succession Planning

Structuring assets to safeguard wealth for future generations.

Business succession planning for entrepreneurs and family-owned enterprises.

Exchange Control Expertise

Assisting with South African offshore investments and wealth migration.

*PRICING AVAILABLE ON REQUEST

Tax & Legal Coordination

Working alongside top-tier legal and tax advisors to ensure optimal structuring.

Ensuring compliance with Swiss, South African, and global financial regulations.

Special Focus on South Africa

SFO Trust AG has extensive experience in offshore structuring for South African individuals and businesses, ensuring full compliance with SARB (South African Reserve Bank) and SARS (South African Revenue Service) regulations.

Tax-Efficient Structuring

Advising on legal tax strategies for South African expatriates and business owners.

Trust & Corporate Solutions

Assisting South Africans in setting up trusts, foundations, and corporate entities.

Emigration & Expatriate Planning

Supporting South African residents in establishing international financial structures.

With our deep understanding of South African financial regulations, we offer seamless cross-border wealth solutions, ensuring compliance and financial security.

*PRICING AVAILABLE ON REQUEST

SFO TRUST AG

Talacker 41, CH-8001 Zurich, Switzerland
+41 58 387 80 00
info@sfo.swiss

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