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By Marco Gantenbein, Mario A. Mata



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Swiss Annuities and Life Insurance: Secure Returns, Asset Protection, and Privacy By Marco Gantenbein, Mario A. Mata **Bibliography**

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Editorial Review

Review

"Does an exceptional job of laying out all the relevant issues for someone who is new to this area." STEP Journal June 2008

From the Inside Flap

Switzerland, one of the most attractive countries in the world to invest and to do business in, has attracted foreign investors for decades. The financial services sector, and particularly private banking and insurance, has built a unique international reputation that attracts clients from all over the world. Those who choose to invest with Swiss insurance companies benefit greatly from this financial expertise, where Switzerland's position is second to none. *Swiss Annuities and Life Insurance* examines the key characteristics of Swiss annuities and life insurance, and explains how the use of these products can help achieve asset protection, growth, and, in some cases, significant tax planning opportunities.

This invaluable reference resource is designed as a guide for asset protection lawyers, tax lawyers, estate planners, financial advisors, family offices, and private investors who are particularly interested in diversifying investments outside their home country and like what Switzerland has to offer. Accessible even to those without a legal or financial background, this guide offers clear, in-depth information on the most important issues concerning Swiss annuities and life insurance. The authors detail why Switzerland is the best place to invest, how the Swiss life insurance industry operates and is regulated, and how Swiss insurance brokers are supervised by the government. They explain the many genuine tax advantages for foreign investors, identifying particular insurance products available in Switzerland and Liechtenstein that offer attractive tax benefits that are legal, sound, and compliant with the tax system in the investor's home country—including specific insurance products that offer tax deferral or other tax advantages for U.S. citizens. They also reveal why these products can be a superior alternative to traditional vehicles for asset protection and estate planning such as foundations or trusts.

Swiss annuities and life insurance are an excellent alternative investment, particularly for high-net-worth individuals. With this expert guidebook, you too will learn how to safely capitalize on these attractive products.

For more information on Swiss annuities, please visit: www.swissannuities.com.

From the Back Cover

Praise for *Swiss Annuities & Life Insurance*

"Bravo! This is the definitive book for American and Canadian taxpayers and their tax planners. It comprises a complete treatment of the unparalleled Swiss financial-related insurance products, which represent the best that offshore has to offer in asset protection, estate planning, and investment vehicles today."

—Hoyt Barber, Vancouver, Canada, author of *Secrets of Swiss Banking and Tax Havens Today*

"This is an important work that I recommend enthusiastically to anyone working with and counseling others with respect to Swiss annuities and life insurance. The book includes a detailed analysis of these highly

versatile investments and a thorough discussion of the laws applicable in the relevant jurisdictions involved. The result is a book that is both well researched and eminently useful to anyone seeking to use these vehicles to best advantage. I know that this book will form an invaluable part of my library and that I will refer to it regularly in my work."

—Stanley A. Barg, Philadelphia, United States, Partner, Duane Morris LLP

"An unparalleled holistic overview of Switzerland with its life insurance and annuities environment. Profound and written with due attention to detail—yet easy to follow—it allows the reader to gain quick and specific knowledge. While it contains practical guidance to any professional in the financial planning and insurance arena, I find it equally useful for private investors who may be attracted by diversity abroad. Truly a commendable eye opener with great information value."

—Heinz Eggenberger, Zurich, Switzerland, ARM, General Manager, AIG Europe (Switzerland) and President, IIS Insurance Institute of Switzerland

"The publication of Swiss Annuities and Life Insurance is a remarkable achievement: a readable, concise, and balanced account of the political, economic, and social history of Switzerland since World War I and of the development of the Swiss insurance industry and the growing sophistication of its products as investment vehicles. Unlike most books on these subjects, Swiss Annuities and Life Insurance is well written, comprehensive, and a unique source for professional advisors as well as for investors. I wish there had been a book like it when I spent hours and hours researching the purchase of my annuities."

—Dr. Edgar Gunther, New York, United States, former executive vice president of an international investment management company and former research director of Fortune magazine

"This compendium represents the first in-depth and comprehensive analysis of the unique advantages offered by Swiss annuities and insurance for those seeking wealth preservation and tax minimization. Written by some of the leading authorities in the field, this book should be on every professional's bookshelf and is also an excellent resource for those considering the purchase of these products."

—Gideon Rothschild, New York, United States, Partner and cohead, Private Client Services, Moses & Singer LLP

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