Entrepreneurs are usually fully involved in the day-to-day business. This leaves little time to take care of administrative issues relating to the shares they own in their businesses. In our experience this situation poses risks, but also creates opportunities for the future. Dealing with owner shares in a professional manner can create opportunities for the company's development.

Our qualified advisory service in the context of corporate housekeeping will assist you with questions such as:

- How can the management of owner shares be professionalized, and what advantages does this bring?
- How can the provisions of shareholder agreements be implemented efficiently?
- How can the expenses and risks of corporate actions be minimized?

The key to answering this question is a systematic advisory process. Your client advisor manages this process, and brings in the experts relevant for your particular situation.

Reliable and convenient safekeeping for your shares
There are many advantages to holding shares owned in a business in shareholders' personal safekeeping accounts:

- Simple and secure handling
- Legal certainty for shareholders
- Clarity vis-à-vis tax authorities
- Professional appearance when dealing with stakeholders (shareholders, financing partners, employees)
- Elimination of reporting obligations for bearer shareholders for intermediated securities

In short: the professional management of shares owned in a business builds trust and confidence.

Establishment of intermediated securities
The maximum professionalization of the shareholder base can be achieved by establishing intermediated securities through the introduction of your shares into the official SIX/SIS securities system. This process primarily involves:

- Dematerialization of physical share certificates
- Credit Suisse assumes a paying agent mandate
- Introduction of an electronic share register
- The Entry of intermediated securities are booked into an individual securities safekeeping account

Efficient corporate actions
Corporate Housekeeping allows you to delegate the execution of corporate actions conveniently and cost-effectively to Credit Suisse

- Capital increases
- Interest payments and amortizations
- Dividend
- Capital reductions with par value repayments

Management of employee participation plans
Credit Suisse is the leading Swiss bank in the administration of employee participation plans. Our services include:

- Administration of all common forms of equity participations (shares, options, phantom shares, contingent rights etc.)
- Option to block shares pursuant to FTA Circular No. 37 on the realization of tax advantages for plan participants
- Provision of reports for all stakeholders (company management, plan participants, tax authorities)
- Web access for plan participants and management

Corporate housekeeping lays the foundation for strategic options
Various strategic options are created through the professionalization of the structures for owner shares, such as:

- Admission of additional investors, culminating in a future IPO
- Repayment of capital to the shareholders
- Participation of employees
- Advance payment of future dividends
- Optimization of the intrinsic value of the owner shares

Corporate Housekeeping for SMEs
Services for Your Owner Shares
Costs
A short discussion of the topic or the first meeting of a detailed consultation is free of charge for existing clients.

Contact us
We will be happy to arrange a personal consultation. Please call us on +41 848 880 844*.

Further interesting topics for entrepreneurs can be found online: credit-suisse.com/entrepreneur

* Telephone conversations may be recorded.