

Corporate housekeeping for SMEs

Services for your shareholders

Entrepreneurs are usually fully involved in the day-to-day business. This leaves little time to take care of administrative issues relating to the owner shares. In our experience, this situation poses risks, but also creates opportunities for the future. Dealing with owner shares in a professional manner can create possibilities 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 ownership percentages of the shares be ensured at all times?
- How can owner shares be kept securely and transferred efficiently?
- What opportunities do modern solutions offer me as a company owner?

The key to answering these questions is a systematic advisory process. Your client advisor will manage this process and involve the relevant experts for you as required.

Digitalization of your share certificates

There are many advantages to holding owner shares in shareholders' personal securities safekeeping accounts:

- Flexible, secure handling
- Professional reporting for documentation of ownership to government agencies and other parties
- Professional image when dealing with third parties (shareholders, financing partners, employees)
- The ideal conditions for financing and other transactions

In short, the professional management of share certificates builds trust and confidence.



Creating digital shares (intermediated securities)

Handling share certificates can become complicated as the number of shareholders grows. By creating digital shares, your shares are integrated into the SIX/SIS securities system, thus achieving the maximum professionalization of your shareholder base. The process for creating intermediated securities primarily involves:

- Dematerialization of physical share certificates
- Assumption of a paying agent mandate by Credit Suisse
- Introduction of an electronic share register
- Intermediated securities are booked into an individual securities safekeeping account

Corporate housekeeping lays the foundation for strategic options

Making the structures for owner shares more professional creates various strategic options and an excellent starting point for transfers of ownership, such as:

- Admission of additional investors, including a future IPO
- M&As
- Employee participation
- Succession solutions
- Inheritance

Contact us

We will be happy to arrange a personal consultation.
Call us at +41 848 880 840.*

You will find further interesting topics concerning entrepreneurship online: credit-suisse.com/entrepreneurs

* Telephone calls may be recorded.

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