

Complex situations require profound and practical knowledge and tailor-made solutions

Employers, executives, employees, independent professionals and HNWI are confronted with increasingly complex questions and practical requirements around pension and social security contributions and benefits, in particular when it comes to cross-border professional activities. In the context of M&A transactions, pension aspects and questions relating to key executives' social security status are of growing importance. These developments require experts with a good balance between in-depth legal knowledge, subject-matter expertise hands-on problem solving skills and a sound understanding of the related industry-relevant developments.

We assist our corporate clients in the management and structuring of the pension and social security aspects relating to their executives and workforce and in the implementation of pension-related legal aspects in transactions. We support our executive clients, entrepreneurs and globally mobile professionals on efficient and practical options on how to structure their professional activities from a pension and social security perspective. We advise our HNWI where applicable on relevant social security and pension-related questions and planning possibilities. Our solutions are always sophisticated and comprehensive but still practical and efficient. We include relevant tax, employment and corporate law aspects into our advice and guidance. Our clients range from multinational groups active in various sectors to financial institutions, private equity investors, executives, employees, independent professionals to HNWI.

Practical and strategic pension and social security advice

While our pension and social security lawyers work closely together with our other practice groups, we also rely on our excellent working relationship with domestic actuaries and technical pensions and social security experts as well as pension experts in other jurisdictions and with representatives of the various Swiss authorities. This enables us to offer effective and strategic advice on all issues our clients face in specific transactions, the full lifecycle of their executives' and workforce's activities as well as important milestones in their professional environment and development and their day-to-day business.

Our general areas of the Bär & Karrer pension and social security practice include:

- Advising on social security and pension aspects in relation to M&A transactions and corporate restructurings
- Planning and structuring of social security and pension affiliation in complex international cases, including drafting, negotiation and implementation of relevant contractual clauses and corporate documents
- Assisting in social security audits, including support with follow-up matters and liability assessments as well as limitation of liability exposure for employers
- Composing and organizing pension solutions, including Swiss and cross-border tax planning
- Payroll and declaration services for corporate clients (employers) as well as individuals (employees with or without a Swiss employer, or self-employed persons)
- Social security structuring and implementation of structures relating to entrepreneurial and wealth management activities
- Outlining contracts, incentive and employee participation plans from a social security, pension and tax perspective
- Structuring and payout of social security and pension accruals in complex cases, i.a. in connection with relocations from or to Switzerland and for retirement planning purposes
- Legal advice to pension institutions on structural and organizational matters

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