January 2022

Our Services

Dreyfus Sons & Co Ltd, Banquiers is a traditional private bank specializing in managing the assets of private and institutional clients.

The bank's activities are focused on preserving the value of the assets entrusted to it over the long term and on achieving sustainable returns. All services are tailored to the individual needs of clients. We can draw on our more than 200 years of experience and the most up-to-date knowledge of the financial sector.

Asset Management

Bespoke asset management mandates are one of our core competences. After arranging a personal consultation to define a risk profile, we draw up a targeted strategy geared towards investing your assets primarily in direct investments. Collective capital investment products can also be used to cover special investment needs.

Investment Advice

Our longstanding and experienced client advisors are at your side as partners to assist you with your personal investment decisions. You benefit from access to the most modern and comprehensive information systems. We would be happy to draw up investment proposals that meet your expectations and requirements. One of our other core services is to provide a consolidated assessment of your assets. This allows us to compile an in-depth risk analysis and instigate any concrete measures that may be required.

Family Office

Our customized services mean that we can offer holistic advice and support for individuals, families, family businesses, communities of heirs and companies. If external assistance is required, you can take advantage of a selected network of specialists. We have made a conscious decision not to engage in investment banking in order to preserve our independence.

Basic Banking Services

Securities Trading
As an established market player, we trade via the integrated trading and clearing systems of the SIX Swiss Exchange. A dedicated network of correspondent banks means that we can also offer securities trading abroad.

Securities Safekeeping
We take great care in selecting the custodians we use for securities held abroad. These can be viewed on the custody account statements, which are issued once a year.

Collection of Interest and Dividends, Corporate Actions
We ensure that dividends and interest are credited on time. We also take care of any changes with regard to corporate actions. We check tax deductions and report these on your statements. It goes without saying that these data are taken into account when creating your tax documents.

Regular and Clear Statements of Assets and Account Statements
We place a strong emphasis on presenting our documents in way that is easy to understand. With that in mind, we limit the information provided to that which is really essential. You as a client choose how often you would like to receive the statements.

Account Management in Various Currencies
Both our clientele and the way in which we approach asset management require that we maintain accounts for several currencies. Currency exchanges are kept to a minimum.

Payments in Switzerland and Abroad, Check Cashing, Direct Debit
On request we will take care of all of your Swiss and foreign payment transactions on your behalf (including standing orders and direct debiting system).

Cash Deposits and Withdrawals
Cash deposits and withdrawals in Swiss francs and major foreign currencies can be made at our cash desk or through your client relationship manager.

Credit and Maestro Cards
When signing up for a credit card, you can choose between the currencies Swiss francs, US dollars and euros. You decide whether you want to receive paying-in slips from the credit card company or whether you would prefer to pay by direct debit. A Maestro Card allows you to withdraw cash worldwide at Automatic Teller Machines (ATM) or pay cashless.

Tax Documents
We will draw up the documents you need for your tax declaration on request.

Withholding Tax Reclaims
We will be happy to reclaim withholding tax on your behalf where this is provided for by a double taxation agreement with your home country.

Info Banking
More and more clients need to access their data securely and around the clock. We can send your statements and documents to an electronic lockbox, if desired. It goes without saying that data encryption and password protection are guaranteed and meet the latest security requirements.

Additional Services

Tax Returns Switzerland

We will be happy to compile tax returns for our Swiss clients on request, as well as to review tax assessments and ensure that any taxes due are paid on time. When appropriate, we will also take care of any tax prepayments.

Consolidated Analyses

We will be happy to provide you with a consolidated overview of your securities assets, either on a one-time or a regular basis, even if some of these assets are deposited with other banks.

Legal Advice

For legal advice, you may contact our lawyers. They have access to a broad network of specialized external attorneys.

Execution of Wills, Partition Schemes

We will be happy to act as executor of the will for estates in Switzerland. In the case of inheritances and donations, we can draw up a proposal detailing how securities and balances can be divided up so as to best meet your requirements.

Lombard Loans and Loans Secured by Property

Sometimes you may need financing at short notice, but the timing for selling securities seems inopportune. We can provide you with knowledgeable, fast and simple advice to help you in your decision. We provide loans secured by property exclusively for residential properties located in Switzerland.

Financial Planning Switzerland

Financial planning is centered around your personal wishes and goals. This means that all relevant areas need to reviewed and assessed in a networked manner, including savings, investments, pensions, financing, insurance, succession arrangements and tax optimization. We can develop customized solutions together with you to help you achieve your goals.

Pension Switzerland

We are pleased to offer you to manage your retirement plan assets within the guidelines of the Swiss Federal Law on Occupation Retirement, Survivors' and Disability Pension Plans (BVG) and, at the same time, according to our prudent investment principles within the context of your chosen strategy.

We offer the following innovative, flexible and tax optimized solutions in cooperation with independent providers: Vested Benefits Accounts / Bel-Étage solutions / Pillar 3a / BVG Collective

Dreyfus Sons & Co Ltd, Banquiers
Aeschenvorstadt 16 | P.O. Box | 4002 Basel | Switzerland
Telephone +41 61 286 66 66

Dreyfus Sons & Co Ltd, Banquiers | Delémont Office
Avenue de la Gare 19 | P.O. Box 592 | 2800 Delémont 1 | Switzerland
Telephone +41 32 631 66 66

Dreyfus Sons & Co Ltd, Banquiers | Lausanne Office
Rue du Lion-d'Or 1 | Boîte postale | 1002 Lausanne | Switzerland
Telephone +41 21 706 66 66

Dreyfus Sons & Co Ltd, Banquiers | Lugano Office
Piazza Rezzonico 6 | 6900 Lugano | Switzerland
Telephone +41 91 640 77 99

Dreyfus Sons & Co Ltd, Banquiers | Zurich Office
St. Peterstrasse 1 | 8001 Zurich | Switzerland
Telephone +41 44 225 66 66

contact@dreyfusbank.ch | www.dreyfusbank.ch

Dreyfus Sons & Co Ltd, Banquiers | Representative Office
3 Rothschild Blvd. | Psagot Tower | 18th Floor
Tel Aviv 6688106 | Israel
Telephone +972 3 5525 666

contact@dreyfusbank.co.il