

## The advisers

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Wealth planning in Basel is practised by a network of professions: private bankers and their wealth planning departments, independent asset managers, trustees, lawyers, notaries, tax advisers and accountants. The Basel notaries, who are free professionals and, unlike notaries in many other cantons, often also practise as lawyers, play a central role in the drafting of wills, marriage contracts and contracts of succession.<sup>1</sup>

The professional association for practitioners of trusts and estates, the Society of Trust and Estate Practitioners, has a branch in Switzerland and members in Basel. Its qualification, the TEP designation, is widely recognised as a standard of expertise in cross-border wealth planning.<sup>2</sup> The author, who holds this designation, runs a practice in Frankfurt that advises families and companies with connections to Germany, Switzerland and other countries, working with colleagues in Basel on matters that range from the regularisation of the past to the planning of succession.

The adviser who serves an international family must be able to coordinate. No single professional can master the law of succession, the matrimonial property law, the company law and the tax law of every country in which a family has interests. The value that an adviser brings lies in recognising the questions, involving the right colleagues in each jurisdiction and ensuring that the solutions fit together. Basel, with its location at the meeting point of three legal systems and its long tradition of cross-border business, is a good place to learn this discipline.

### 1 Notes

1. On the organisation of the notarial profession in the canton of Basel-Stadt (free notary system, freies Notariat, often combined with practice as an attorney), see the cantonal law on notaries. To be verified. ←

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2. On the Society of Trust and Estate Practitioners (STEP), founded in 1991, its Swiss branches and the TEP designation, see the publications of STEP. To be verified. ↩

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*For general information only. This article does not constitute legal or tax advice, does not replace advice on an individual case and creates no lawyer-client relationship. It reflects the legal position as of September 2026.*

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