

Services to the clients of the ecosystem: an integrated offering

*Dr Alexander Ressos, TEP
Attorney-at-Law (Switzerland), Solicitor (Hong Kong),
Solicitor (England & Wales)*

One of the strengths of the Geneva financial centre lies in the ability of its actors to work together in serving complex situations. An international family settling in Geneva can find there, within a radius of a few streets, a bank to hold and manage its assets, an independent asset manager or a *family office* to coordinate the whole, a lawyer for succession and tax planning, a notary for the deeds, a fiduciary for the administration of companies, a trustee for the trusts, a broker for insurance and specialised advisers for art, real estate or philanthropy.

This integrated offering distinguishes Geneva from centres where services are dispersed or where certain actors are lacking. It rests on long-standing relationships of cooperation between the professions, on a shared culture and on geographical proximity. It is a commercial argument that the financial centre puts forward to large international fortunes.

It nevertheless presupposes rigorous coordination. Each actor has its own obligations, its own limits of liability and its own compliance requirements. The client, or the client's *family office*, must make sure that the advice received is consistent, that information circulates in compliance with professional secrecy and data protection, and that no one assumes that another has carried out a verification. Situations in which each participant relies on the others are a well-known risk, which the cases revealed by the data leaks have illustrated.

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The role of the *family office* or of the principal adviser consists precisely in ensuring this coordination. The quality of the financial centre is measured as much by the competence of each actor as by their ability to work together in the service of the client, in compliance with the rules.

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