

Vontobel—Executor of Your Will

As an executor with proven expertise, Vontobel will ensure that your estate is distributed in your best interests and will assist your heirs in all matters.



Role of the executor

Upon your death, your assets pass directly to your heirs. By law, your heirs automatically form a community of heirs and must manage and distribute the inheritance together. However, you have the option of relieving your heirs of this burden by appointing an executor of your will. An executor is responsible for the proper execution of your will and handles all administrative, legal, financial and tax matters related to the estate. A good executor will also lend support to all of your heirs and try to reconcile any differing opinions and constructively seek compromise solutions.

Appointment of an executor

It is important to appoint an executor of your will before you pass away. You do this as part of your testamentary disposition (in a will or in an inheritance contract). You may appoint any competent person as the executor of your will. Legal entities are also eligible.

If you have appointed an executor, the responsible authority will issue them an executor's certificate after your death resp. after the opening of the will. This certificate authorizes the executor of your will to represent the community of heirs in dealings with third parties and to act on behalf of the heirs.

Executor's responsibilities

The executor's responsibilities include but are not limited to the following:

- representation of heirs in dealings with authorities, banks and other third parties
- completion of all administrative and legal tasks (reporting the death to relevant authorities/institutions, obtaining the certificate of inheritance, terminating continuing obligations such as housing and health insurance, dissolving the household, etc.)
- determination of the estate assets (taking inventory, obtaining appraisals, carrying out a potential property law settlement)
- administration of the estate assets
- payment of the decedent's debts from the estate assets
- sale of real estate
- settlement of legacies
- handling of all tax matters
- division of the estate according to your testamentary disposition or according to the law and in consultation with the heirs
- drawing up of a contract of inheritance and/or a final report

Executor's remuneration

By law, the executor is entitled to appropriate remuneration for their work. According to the Federal Supreme Court, the executor's fee is appropriate if it is based on effective costs and a customary hourly rate.

Vontobel as the executor of your will

Appointing Vontobel as the executor of your will has the following benefits:

- ensuring the orderly settlement of estates by specialists with a high level of expertise
- relief of the heirs from all legal, financial, tax, and administrative tasks
- neutrality in case the heirs disagree
- as a legal entity, Vontobel ensures persistence in the services of will execution
- professional administration of estate assets

By appointing Vontobel as your executor, you ensure that the estate is handled professionally. Vontobel's expertise is particularly recommended in the case of complex family and/or asset relationships, when there are numerous heirs in Switzerland and abroad, or when inheritance disputes are anticipated.

If you need personalized advice, please do not hesitate to contact our experts.

Secure the following options

- assistance with the preparation of testamentary dispositions and the legally valid appointment of an executor
- professional estate administration by Vontobel as the executor of your will

Legal notice

This letter was drawn up on the basis of the information sources available as of the date indicated at the beginning of this document. The information it contains is based on Swiss law and may change at any time due to legal amendments or changes in official practices by the authorities. This letter does not constitute any advice on legal, tax, or other matters, but rather serves purely informational purposes and is for use by the recipient. Vontobel does not warrant that the information included in this letter is reliable, correct, and/or complete and does not accept any liability for the suitability and appropriateness of procedures, actions, or decisions based on the use of this information.

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