

# BDO LUXEMBOURG'S SERVICES TO FAMILY OFFICES

We help you focus on your core business by transferring some of your operational services to our experts.





# WE UNDERSTAND WHO YOU ARE & YOUR ACTIVITIES

In Luxembourg, many Family Offices have been established to address the unique needs of high-net-worth families and their businesses.

These Family Offices handle a wide range of responsibilities on a daily basis. Beyond overseeing the family's assets, they are tasked with ensuring financial stability while managing the risks, ensuring a legacy, planning a profitable transfer of wealth, establishing business processes, ensuring sustainable resource management and engaging with various stakeholders, among many other tasks.

**As a Family Officer, your responsibilities typically include:**

- ▶ Monitoring the performance of investments
- ▶ Evaluating new investment opportunities
- ▶ Regularly monitoring the organisation/ structuring of your client(s)' assets in the light of regulatory, wealth and tax development
- ▶ Monitoring the holding structures, underlying assets, and similar tasks.

These duties are very challenging indeed.

**You might encounter challenges in finding:**

- ▶ The right people with the appropriate expertise and retaining them
- ▶ The right IT tools and necessary level of data protection against cybersecurity threats
- ▶ The right advice for each specific situation

**We can help you to focus on your core tasks and save time**

By outsourcing some of your work to our experts who will:

- ▶ **Assist** you with a **high-degree of flexibility**
- ▶ **Guarantee** you constantly a **high-quality service**, and
- ▶ **Meet** the **required deadlines**





BASED ON OUR EXPERIENCE, THE TRUE CHALLENGE FOR ANY FAMILY OFFICE LIES IN OVERSEEING ALL ACTIVITIES SMOOTHLY; DESPITE LIMITED, TRUSTED RESOURCES.



# OUR SERVICES TO FAMILY OFFICES

At BDO Luxembourg, we have a dedicated team of over 60 professionals, with diverse cultural backgrounds and deep financial and administrative expertise; ready to guide and support you every step of the way.

By partnering with BDO, you can stop worrying about:

## QUALITY

We are committed to delivering the highest standards, with expert oversight at every stage. Chartered accountants ensure accurate accounting and reportings, while tax advisors manage tax return preparation and all related follow-ups.

## TEAM

We provide continuous, reliable service through a highly responsive and dedicated team. This allows you to focus your time and resources on more strategic matters, knowing that your affairs are in trusted hands.

## TECHNOLOGY

Our experienced accounting and tax teams leverage advanced technology and constantly explore digital innovations to deliver tailored, future-ready services.





## PROFESSIONAL ACCOUNTING & ADMINISTRATIVE SERVICES

We offer a comprehensive range of services to support your operational needs:

- ▶ Assistance with the company setup, including corporate incorporation, bank account opening and related formalities
- ▶ Provision of a registered address
- ▶ Corporate secretarial and compliance services ( e.g. board and shareholder meetings, beneficial owner registration)
- ▶ General administrative support, such as follow-up daily correspondence, filling in forms, operating and management of bank accounts where required
- ▶ Provision of local managers or directors with the appropriate skillset to representing your companies
- ▶ Accounting services including bookkeeping, preparation of annual accounts and tailored financial reporting
- ▶ Regulatory reporting, including BCL reports, country-by-country reporting (CbCR), and others
- ▶ Payroll services: payroll calculation, acting as bank proxy, and advisory on split payroll regimes
- ▶ Renting of serviced office space through our business center (if additional space to your existing Family Office structure is needed)
- ▶ Fund Services (central administration, NAV calculation, transfer agent, investor registrar, and so forth, if you need assistance on investment fund area)





WE COMBINE PRACTICAL EXPERIENCE,  
REGULATORY OVERSIGHT, AND A TRUSTED  
LOCAL NETWORK OF EXPERTS. WE ARE WELL-  
POSITIONED TO HELP YOU ACHIEVE YOUR GOALS,  
EFFICIENTLY AND WITH CONFIDENCE.





## TAX COMPLIANCE SERVICES

- ▶ Direct tax compliance services (preparation and filing of direct tax returns including requests of tax credits)
- ▶ Indirect tax compliance services (preparation and filing of VAT returns)
- ▶ Personal tax compliance services, including Human Resources & employment services
- ▶ Tax compliance regulatory services

## TAX ADVISORY SERVICES

- ▶ Transfer pricing
- ▶ Direct tax advisory services
- ▶ Indirect tax advisory services
- ▶ Regulatory tax advisory services
- ▶ DAC 6 monitoring and assessment of a specific transaction
- ▶ Assessments of tax risks and inefficiencies derived from ATAD 1, ATAD 2 and ATAD 3 (Anti-Avoidance Directives)
- ▶ BEPS (Pillar 2) analysis
- ▶ FATCA - CRS (Foreign Account Tax Compliance Act - Common Reporting Standard) assistance

# ABOUT US

## OUR ADDED VALUE

At BDO, we always put our clients' needs first. We aim to build long-term partnerships by delivering real value and helping you succeed.

We understand and respect the cultural differences. Our team is proud to support Luxembourg-based Family Offices managing international wealth.

- ▶ We provide a sophisticated one-stop shop solution.
- ▶ We offer a dedicated point of contact for all services.
- ▶ We share our experience and know-how with you, proactively monitor legislation (including draft laws) and highlight what matters most.
- ▶ We anticipate your needs through regular meetings and close collaboration.
- ▶ We act fast and focus on delivering efficient, value-for-money solutions.
- ▶ We are connected and backed by a large and reliable network.

### BDO Luxembourg

Established since 1950



Audit & Assurance



Advisory



Business Services & Outsourcing



Tax



3 offices



650+ employees



### BDO GLOBAL

1,800 Offices worldwide\*

119,611 Total personnel\*

166 Countries within our global reach

€14b Global Revenues

\* Statistics as of 30.09.2024

\* including BDO's exclusive alliance firms





## OUR EXPERTS



**Christian Beaucourt**  
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Christian is a partner in Accounting & Corporate Services department and responsible for the High-Net-Worth Individuals' (HNWI) Client segment and Family Office services of BDO Luxembourg. Prior to joining BDO in 2015, he worked for 18 years in the banking sector in Luxembourg and has a professional experience of more than 25 years.

At BDO Luxembourg, Christian oversees setting up and following up of Family Office services dedicated to HNWLs. This includes managing internal BDO teams as well as external service providers such as banks, insurance companies, law firms, and tax advisers.

Furthermore, Christian supports the portfolio of about 200 SOPARFIs owned by HNWLs, which includes domiciliation, accounting and tax services and the follow up of structures / operations.

Besides this, he is responsible for purchasing the Domiciliation and Fiduciary activities of two banks based in Luxembourg, which contains the tasks of negotiating of the conditions of the transfers, as well as the implementation of the teams and the clients' structures and the supervision of the activities / teams and development of the business with the concerned clients and banks.



**Burcu Özsoy**  
Family Office Director  
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Burcu joined Accounting & Corporate Services as Family Office Director in early 2024 and contributes to development of Family Office Services.

She has held managerial positions at prestigious companies in Luxembourg for over 15 years. Burcu began her career in 2007 as an Audit Manager at one of the Big 4 firms, where she was responsible for IFRS and consolidation clients in the private equity and real estate sectors.

In 2012, she joined another Big 4 firm as Senior Manager in Tax & Accounting practice, serving institutional groups with comprehensive accountancy services, including tax compliance. She was part of the IFRS desk, collaborating closely with audit department, and regularly delivered internal and external training sessions.

From 2018 to 2024, Burcu worked for a prominent European family to establish and manage their shared services center in Luxembourg. During this period, she also held several board memberships.

Burcu is a Certified Internal Auditor and CPA. She holds the Luxembourg Taxation Diploma and she is a member of ILA (Luxembourg Institute of Directors).



# INTERESTED?

## GET IN TOUCH WITH OUR EXPERTS:

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## BDO in Luxembourg

▼  
Audit &  
Assurance

▼  
Advisory

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Business Services &  
Outsourcing

▼  
Tax

Weiswampach

Diekirch

Luxembourg

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