

LEO TRUST'S STAFF SET THE BAR HIGH, ADAPT RAPIDLY TO CHANGE

Dr. Roderik JP Strobl, Relationship Manager for Key Clients, **Leo Trust Switzerland**, talks to **Tom Burroughes**, Group Editor at *WealthBriefing*, on his firm's achievements.



Dr. Roderik JP Strobl
Relationship Manager for Key Clients,
Leo Trust Switzerland

With headquarters in Zurich and offices in Lugano, Nicosia and Panama City, Leo Trust Switzerland has been serving its clients since 1980. We have a tradition of providing bespoke high-quality fiduciary services to our clients based on our long-standing expertise. Our innovative and foresighted strategy places us as one of the leading pioneers in crypto related estate and wealth planning services. Leo Trust's staff of about 50 employees handles more than 4,000 corporate entities, private and institutional client mandates and trust structures in numerous jurisdictions.

What sets you apart from your peers this year and why?

Our staff. Their unique expertise as long-standing practitioners in the field is pivotal. Furthermore, Leo Trust adapts to the latest developments in corporate services, working with leading experts to develop innovative yet compliant services such as asset protection structures using advantageous jurisdictions. Leo Trust's track record of over 40 successful years in the industry recommends it as a trustworthy partner for long-standing business relationships. Our processes are centred on client needs, reducing internal

bureaucracy, and promoting true client centricity. We use resources such as in-house senior trust officers, dedicated relationship managers, lawyers, accountants and compliance professionals. This strategic advantage allows Leo Trust to proactively provide services in an efficient and competent manner. We consider each client individually, review their needs and analyse how these needs can be best met. Leo Trust has access to the latest technological trends and market developments around the world, putting it ahead of its competitors.

Leo Trust distinguishes itself from its competitors by offering compliant cryptocurrency services by using state-of-the-art software to track and verify transactions. This software is equivalent to that used by banks and exchanges. Leo Trust is one of the first independent trust companies to embrace such advanced technology.

We encourage our employees to contribute their own ideas through an open and innovative process and provide internal training led by qualified experts. We search for client added value that no other trust companies address. Unlike many of our competitors, our remuneration system includes numerous soft factors, fostering cooperative teamwork based on fairness.

Leo Trust is family owned and is family entrepreneurship in practice. That is why we understand entrepreneurial families and their needs. Ultimately, we care about clients and our clients appreciate this fact.

1. *A perfect example of how Leo Trust combines tradition & innovation is ...* knowing our clients' needs and using innovative software and well-established digital processes to deliver top quality services.

2. *Leo Trust's truly client-centric and trust-based strategy means ...* our clients come first. We are their anchor in these turbulent times.

3. *The best way to describe excellence in Leo Trust's workaday life is ...* simply a happy client.

4. *Let me show you how our clients benefit from our commitment and*

interdisciplinary team ... Leo Trust provides you with just about everything you need for successful wealth planning.

5. *Holistic is not a question of our prestige, it's ...* for us, the norm, and describes how we approach our clients' needs daily.

How has Leo Trust's business (model) reacted to the pandemic?

We use agile systems and workflows that can adapt quickly. This enables our business model to remain fluid and client focused. For instance, home office came naturally to us because we already had the IT in place to enable secure remote data access. Leo Trust ensures that its employees stay informed about the latest market developments by using a tool whereby current knowledge is centralised and accessible from anywhere, a true application of the concept known as the 'learning organisation' proposed by academics such as Peter Senge.

What is Leo Trust going to do to master this challenging environment?

Leo Trust has grown in this challenging environment. The right people, supported by state-of-the-art IT systems, are in place to address client issues. We are agile and this allows us to master any challenge which comes our way. In addition, we have an extensive network of friends, partners and clients who help us just as we help them when they need our bespoke services.

Whom do you look to for inspiration and ideas?

We are inspired by our clients and other stakeholders. Based on open and constructive communication, Leo Trust receives requests from existing clients daily, many of which are the source of inspiration for new services. ■

