



Simply Put Will – inheritance contract

In Switzerland, inheritance of real estate is governed by a combination of national and cantonal laws, particularly tax regulations. This includes the consideration of compulsory portions for certain heirs, the calculation of inheritance tax, and strategic estate planning.

Will

A will is a **unilateral personal declaration of intent** written prior to death. It has no impact prior to a testator's passing. The author can **revoke, change** or nullify it at **any time**.

A person who wishes to write a will must be of legal age (18 years old) and capable of judgement. A personal will is valid only if it is fully written, dated, and signed by hand.

Inheritance contract

The inheritance contract provides the possibility to arrange the estate with the involvement of all parties concerned, tailored to the individual needs of the contracting parties – meaning **independently of statutory compulsory portion entitlements**. As with making a will, anyone wishing to enter into an **inheritance contract** must be of **legal age** and **capable of judgement**. The inheritance contract must be executed before a **public notary** and in the presence of **two witnesses**, who must simultaneously confirm that the contracting parties were of sound judgment at the time of signing.

smzh tip



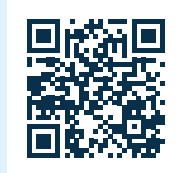
Thomas Kaufmann
Chairman of the Board

“ It is important to understand that statutory succession may not correspond with your individual wishes and ideas. This is particularly true if your family situation is non-traditional or if you are a business owner. I encourage everyone to seek expert advice on this topic – even if it may not be pleasant to think about in the first place.

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smzh for you

- **Individual advice:** We place your personal circumstances at the center – whether we focus on family matters, partnership, or entrepreneurship.
- **Legal certainty:** Our experts ensure that your estate settlement is legally sound and clearly worded.
- **Holistic planning:** We think beyond your will – and take into consideration marriage contracts, inheritance contracts, advance care directives, and legal aspects.
- **Tailor-made solutions:** Every situation is unique – this is why we develop tailor-made concepts for your estate planning.
- **Years of experience:** smzh combines legal, financial, and professional know-how – providing solutions that last.



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