



Our dedicated Relationship Managers are here to guide you through the process, helping you delve deeper into what drives you and identify the most effective ways for you to make a meaningful impact. Find out more online.



EMPOWER *CHANGE*

BERGOS PHILANTHROPY SERVICES

WHY PHILANTHROPY?

At the antipode of traditional finance, where people seek the maximization of returns, Philanthropy is all about giving and receiving something much more valuable than money. Philanthropy plays a crucial role in society, contributing to positive social change by addressing various issues and filling funding gaps

IN EDUCATION, COMMUNITY, DEVELOPMENT,
LITERACY, SCIENCE, RESEARCH, ENERGY, ART,
NUTRITION, RENEWABLES, CULTURE, HEALTH,
EMPOWERMENT, CARE AND SUSTAINABILITY.

MAKE AN *IMPACT*
WITH YOUR
WEALTH

GIVE BACK TO YOUR COMMUNITY,
CONTRIBUTE TO A CULTURE OF GIVING,
BUILD A SENSE OF PURPOSE AND FULFILLMENT,
DISCOVER COMMON FAMILY VALUES,
AND HELP YOUR NEXT GENERATION
UNDERSTANDING THE TRUE VALUE
OF THEIR MEANS.

BERGOS HUMAN PRIVATE BANKING

At the heart of our philosophy lies a core belief in the intrinsic value of humanity. We are humans working for and with humans, embracing the unique qualities and values that define each individual. We recognize that money, while mostly measured in financial terms, holds a deeper power — the ability to enhance lives and uplift communities.

Bergos' commitment extends far beyond traditional banking. We view assets not only as financial resources but as instruments to invest in people, recognizing their potential to drive positive change in both the society and the environment. Our Philanthropy services translate our commitment to take a step further, turning our belief into impactful action.

PHILANTHROPY

PHILANTHROPY AT THE CORE

OUR BOARD MEMBERS SHAPE BERGOS` DNA FOR POSITIVE IMPACT

“You have to give your talent, you have to give your time and your passion, and you have to share your wealth to try to make a better world. It’s not just putting money somewhere; it means much more than that”

– Patricia Guerra, Partner of the Swiss law firm MLL Legal

“To me, philanthropy and caring for others is very important, and there is always something coming back. Especially for us, who are so well-off, it is almost an obligation, not only to take, but also to give back. And in my opinion, it’s not a matter of quantity, but more a matter of quality, so almost everyone can do something.”

- Sylvie Mutschler –v.Specht, Member of various Supervisory and Advisory Boards

“Jacobs Foundation is on a big mission to help stakeholders in cacao growing countries to improve their income and livelihoods. Our projects have always been very touching to me and my family”

– Andreas Jacobs, Chairman of INSEAD, shareholder and former Chairman of Barry Callebaut, the world’s leading cacao and chocolate manufacturer.

“My goal is to help them help themselves. I want to focus my efforts on something where I can say: I have supported a project with a visible, sustainable and long term impact.”

- Christof Kutscher, Chairman of the Board of Directors at Bergos AG and Member of the Board at Carmignac, Indeez and Gnóthis Holding SA.

ENGAGEMENT OF THE BERGOS PRIVATE BANK

Reflecting our commitment to making a lasting impact, Bergos builds on this legacy by actively supporting projects and committing to an annual increase in donations, with a goal of a 10% increase each year. Our primary beneficiaries are the Bergos Artist in Residence (AIR) program, the young artists of the Zurich Opera House, and the children's shelter Weidhalde in Zurich.

Extending our commitment further, we actively encourage our clients to embark on their philanthropic journey by offering a 50% discount on the management fees for charity accounts and seek to amplify their impact by pledging 10% of the returns to support our philanthropic projects.

PHILANTHROPY SERVICES

Our tailored approach allows you to create personalized philanthropy plans designed to meet your unique objectives and needs. From a direct, one-time donation to the establishment of your own private vehicle, our broad array of offerings guarantees we can provide the right structure to meet your philanthropic aspirations.

STANDALONE CHARITABLE DONATION

Sometimes, the desire to make a difference arises in the moment, and for those who want to contribute to a cause without engaging in a prolonged philanthropic journey, we offer our support in identifying the suitable standalone donation that will benefit your desired cause. It is a simple and impactful way to support meaningful initiatives on a more immediate basis.

PRIVATE CHARITABLE FOUNDATION

Committed to a long-lasting philanthropic journey? Bergos can help you to establish your private foundation, helping you initiate a meaningful legacy and contribute to causes close to your heart. You will gain the flexibility to shape your philanthropic narrative in your fully owned foundation set up, making it an important commitment for those ready to invest in lasting change.

DONOR-ADVISED FUND

You seek for a long-term philanthropic commitment within a cost-efficient framework? Establishing a sub-fund allows you to support your own charitable purposes while benefiting from shared administrative and operational costs - a service offered with the help of our preferred partner MLL Legal and its umbrella foundation Sombrilla. Ideal for you if you seek tailored service, appreciate the support of a collaborative framework, and are interested in contributing to the causes that matter to you most.

YOUR VISION, OUR EXPERTISE

- Find support and guidance from your Relationship Manager, ready to assist you in every step of your philanthropic journey
- Gain valuable insights on impactful projects directly from our dedicated Philanthropy experts, ensuring your contributions make a meaningful difference.
- Unlock financial benefits by leveraging our partner’s expertise in setting up tax exemptions, maximizing the positive impact of your giving while optimizing your fiscal advantages.

START CATALYZING CHANGE NOW

As you embark on your philanthropic journey with Bergos, it is important to build a foundation that ensures your giving is both meaningful and impactful.

Uncover your Personal Motivations

Discover the essence of your giving. What deeply motivates you to make a difference in the world? Understanding your motivations lays the foundation for impactful philanthropy.

Define your Philanthropic Focus

Identify the issues close to your heart. What challenges do you want to address? By pinpointing the areas that resonate with you, you can create a more targeted and effective philanthropic strategy.

Set your Philanthropic Goals

Envision the change you want to see. Define the results and impact you aspire to achieve. Clarifying your desired outcomes helps shape the direction of your philanthropic efforts.

Craft your Philanthropic Approach

Determine the strategies, timescales, and preferred partners for your philanthropic initiatives. Your approach is the blueprint for turning aspirations into tangible, positive change.

Find a Holistic Approach to Giving

Are there ways you wish to contribute beyond financial support? Bergos is committed to helping you explore avenues for support that extend beyond monetary contributions.