



# GENERFID



BANCA GENERALI

## FIDUCIARY WEALTH ARCHITECTURE

*A fiduciary-based wealth architecture company that aggregates, organises and manages asset complexities, in full compliance with the Client's mandates and instructions.*

# About **Generfid**

Founded in 2001, Generfid S.p.A. is the fiduciary company of **Banca Generali Group**. For over twenty years, it has been assisting and supporting Banca Generali's Financial Advisors, working alongside families, entrepreneurs and professionals in organising and managing their wealth.

It operates with the solidity of a large Group, ensuring **high standards of confidentiality and protection**, which are essential prerequisites for a lasting fiduciary relationship and informed wealth administration.

Over time, the role of Generfid has evolved: building on its fiduciary administration activity, it has developed a broader **wealth coordination** function, becoming a trusted partner able to orchestrate different tools, skills and operators, while integrating a **structured and innovative vision** to meet the wealth needs of families and businesses.

Combining **tradition, trust and ability to innovate**, this approach supports clients in today's decisions and helps them in building sustainable long-term solutions.



# At the cutting edge of wealth management

Generfid contributes to Banca Generali's Wealth Management model by bringing into the Group its **specialised fiduciary administration expertise** able to enhance wealth management quality.

Its presence within the Group ensures **independence and confidentiality**, integrating Banca Generali's Wealth Advisory solutions, focused on enhancing wealth in sectors such as **Corporate Finance, Real Estate & Art Advisory and Succession Planning**.

This synergy supports the goal of offering a **comprehensive, structured range of solutions**, where wealth administration is based on method, professionalism and long-term vision.





# The value of a fiduciary company at your side

Wealth management is becoming increasingly complex: financial assets, corporate shareholdings and long-term decisions require a **structured, informed approach**.

In this scenario, a fiduciary company represents a **point of balance**: it offers expertise, confidentiality and management consistency over time, supporting the Client as a **professional and independent party**.





# Generfid's strengths

Generfid adopts an **integrated wealth approach**, based on listening and thorough understanding of the Clients' needs. Acting with **independence and professionalism**, it supports families, entrepreneurs and professionals in managing complex wealth situations, where it is essential to balance diverse interests.

The experience gained over time enables Generfid to play a **wealth coordination role**, combining tools, roles and solutions within a coherent and structured approach.

As an **independent third party**, it ensures order, transparency and stability in relationships, acting as a **reliable point of reference** in the management and protection of wealth. This approach is complemented by its commitment to **sustainability**, understood as a drive for responsible, transparent processes.

# Generfid services – fiduciary architecture in action

## TRADITIONAL FIDUCIARY SERVICES

In addition to more advanced services, Generfid offers traditional fiduciary administration services: **fiduciary registration, support in generational transitions and wealth management** that ensure continuity, control and order over time.

## TAX AGGREGATOR

As part of its fiduciary administration activities, Generfid supports its clients in the tax management of assets and corporate shareholdings, acting as a **single point of contact** and streamlining their obligations in accordance with applicable laws.



## ESCROW ACCOUNTS

In its capacity as escrow agent, Generfid acts as independent **third party entrusted with safekeeping the funds or assets held in escrow**. The funds are held in escrow until the conditions agreed between the parties are met, guaranteeing protection and transparency throughout the transaction.

## SUPPORT IN TRANSACTIONS AND CLUB DEALS

Generfid supports Clients and professionals in **managing transactions relating to corporate shareholdings and strategic assets**. It coordinates the parties involved, ensuring orderly and stable governance of the transaction.

# Value for Clients

Choosing Generfid means benefiting from a professional wealth administration support.

A trusted partner that:

- **coordinates** different tools, skills and interests;
- **ensures confidentiality and administration of the assets;**
- **reduces complexities** through method and an integrated vision;
- **operates promptly with flexibility and expertise.**

The Client is always at the centre, supported by solid, confidential, and forward-looking wealth coordination.



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