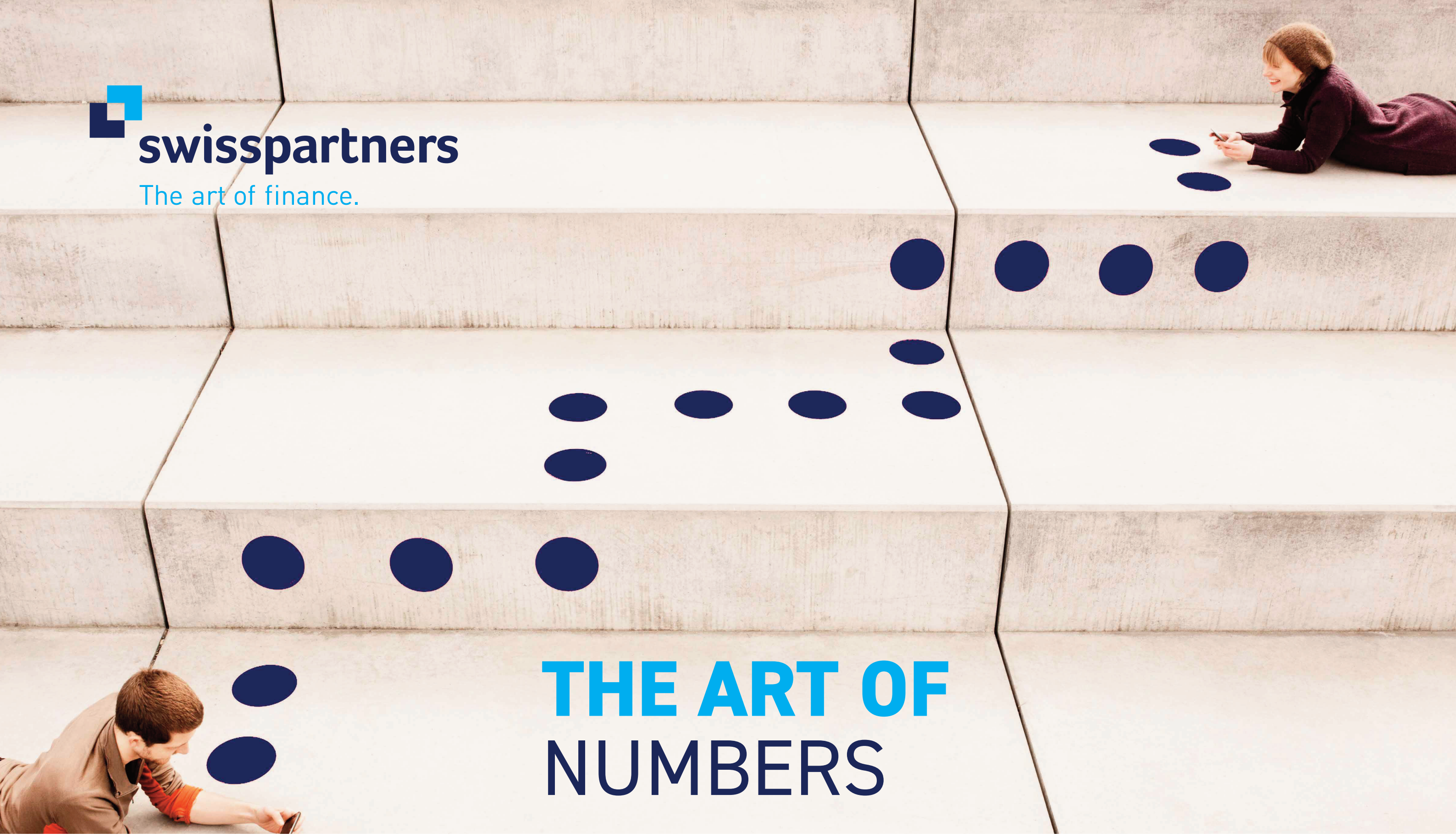

SWISSPARTNERS WEALTH MANAGEMENT

Wealth management is a service that relies on trust and mutual respect. Four fundamental factors are indispensable if you are to preserve and grow your capital over the long term: a team of experienced and prudent investment specialists, a structured investment process, legal experts who ensure compliance with ever more extensive regulatory and tax provisions and up-to-date information technology. A further key element is proper risk management that protects your assets against short and long-term losses.

As one of the leading external wealth managers with Swiss roots, swisspartners focuses on investment strategies for the long term. We analyse the risks and outline opportunities suited to your individual situation. We are not in the business of short-term profit maximisation. Instead, we arrive at future-proof solutions and achieve a steady performance by means of meticulous evaluation, forward-looking actions, understandable concepts and broad diversification.

INVESTMENT PHILOSOPHY

Our process is based on analysing and monitoring risks as well as maintaining a consolidated overview of your assets. Security, diversification and transparency are the key pillars of our systematic investment decisions.

Risk analysis

Each and every individual differs in terms of their appetite and capacity for risk. A detailed, personal client consultation with you enables us prepare an individual risk analysis tailored to your situation. We then use this as a basis to define your investment profile. This process creates the bedrock for all future investment decisions.

Risk monitoring

Portfolios that are to be successful over the long term require a structured and controlled investment process that incorporates continuous monitoring and adapts to changing market conditions at regular intervals. This is why we review both your risk appetite and your risk capacity even after we have drawn up your investment profile, tailoring them to your personal circumstances on an ongoing basis.

Consolidated overview of all your assets

We offer you a consolidated and transparent overview that encompasses all your assets – even if they are held across various banks. Providing a consolidated presentation is the only way to ensure that we can take account of your current and future situation in life as part of a detailed, comprehensible and forward-looking approach, as well as weighing up potential risks.

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WEALTH MANAGEMENT

CHOOSING THE RIGHT MANAGEMENT CONCEPT

swisspartners offers three different types of mandate to safeguard and grow your wealth:

Wealth management mandate

You leave the day-to-day investment decisions – which are tailored to your investment profile – to us. We make these decisions based on the risk analysis and the criteria and wishes agreed with you in advance.

Advisory mandate

With an advisory mandate, you make your investment decisions yourself. swisspartners is at your side as a proactive and globally oriented advisor. As specialists with detailed and in-depth expertise, we provide you with innovative investment ideas. At the same time, we never lose sight of your individual preferences. An advisory mandate is primarily geared towards clients who, while they take a close interest in events on the financial markets, still value expert advice.

Execution only

With an execution-only mandate, you make your own decisions on buying and selling securities without receiving any suggestions or recommendations from us. While you act autonomously, we support you with the administrative side of securities trading.

OUR PASSION – ADDED VALUE FOR YOU

An investment is not a static, but rather a dynamic process. The constantly shifting environment in the world of finance calls for continuous monitoring of the investment process. Alongside other factors, this is essential in view of the rapidly changing regulatory environment.

Once your risk profile has been defined, we will review it on a continuous basis, constantly analysing the mood on the markets in respect of your tailored investment concept and systematically adjusting your investments to your personal requirements as necessary. This is all part of our conscientious and passionate approach to what we do – for you and all our clients.

LOCATIONS

We are available in person at our offices in Switzerland and Liechtenstein.

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