

Convenient and worry-free

The carefree package: Assets

The financial boutique with heart

Are you looking for sound advice and guidance on complex financial issues? Would you like a clear overview of all your assets and a sustainable strategy for their future development? Our solution: the carefree package from swisspartners. Because in turbulent times, nothing is more valuable than a reliable partner who is at your side with advice and support. Our specialists fulfill your individual wishes for asset management, investment advice and portfolio analysis. Comprehensible, personal, committed, tailor-made and independent of banks.

Asset management and advice

Flexible service modules:

- Mandate for asset management or investment advice
- Active portfolio management or support
- Implementation and monitoring of your investment strategy, taking into account current market developments
- Continuous analysis of the financial markets
- Strict risk and performance monitoring
- Comprehensive and regular reporting

Costs:

Individual and by arrangement

Portfolio analysis

Flexible performance modules:

- Performance analysis in relation to the peer group
- Consolidated asset analysis across various banks/custody accounts
- Review of asset and currency allocation taking into account the client profile
- Reasonableness of the products used and diversification
- Review of the management costs and the investments used
- Risk assessment

Costs:

Individual from CHF 1,200 (excl. VAT)



Your contact person

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