

- 360° VIEW OF YOUR GLOBAL ASSETS
- BESPOKE ANALYSIS OF YOUR ASSETS
- GLOBAL CONSOLIDATION OF YOUR ASSETS
- DIGITAL PRESENTATION OF ALL YOUR ASSETS
- ABSOLUTE PRIVACY

YOUR WEALTH AT A GLANCE

ONE by swisspartners

Asset structuring

ONE by swisspartners enables you to consolidate and present your global bankable and non-bankable assets and investments in an intuitive way.

Using state-of-the-art data encryption, zero-knowledge protocols and Swiss servers, we offer the highest security standards for the management and storage of sensitive information and documents - with full support in the management of your data.

Consolidation

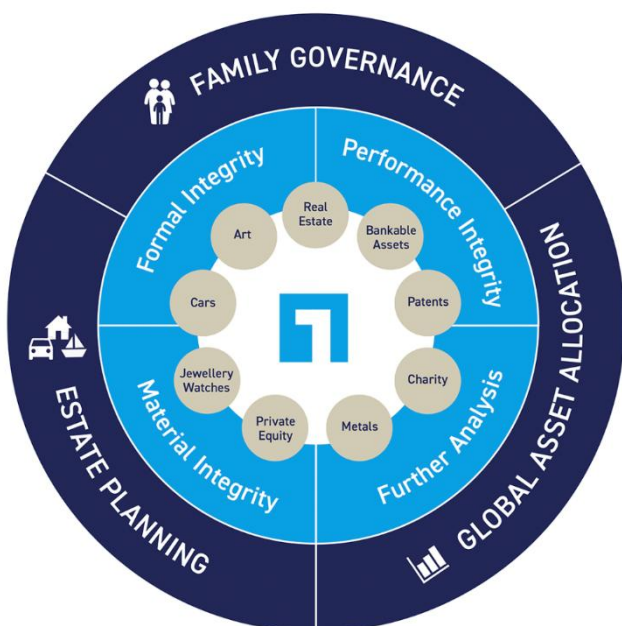
Our powerful multi-custody reporting and consolidation system allows you to consolidate your global assets - including non-bankable assets (e.g. real estate, cars, art and jewelry) - together with your bankable assets from different custodian banks. The interfaces to ONE enable seamless integration of all transactions and the creation of periodic reports and analyses. This gives you an integrated overview of your assets, grouped by asset class. The reporting cycles can be individually tailored to your needs.

Security

The Zurich-based zero-knowledge cloud from ONE by swisspartners ensures that only you can access your sensitive data. ONE protects your data by doing all the encryption and decryption in your browser and only allowing access with your password - which never leaves your browser. This means that neither ONE by swisspartners nor unauthorized third parties can view or access your sensitive data.

Analysis

The analysis of your assets is individually tailored to your needs. We work with you to define the key areas in order to achieve the greatest possible benefit for you.



ONE by swisspartners



Our analytical services include:

Formal integrity

In this step, we check compliance with the defined investment guidelines (bandwidths, investment restrictions, etc.). You receive a detailed analysis of the asset allocation and currency breakdown for individual portfolios and for your consolidated portfolio.

Material completeness

As part of the material completeness analysis we check the transparency of all transactions. All costs associated with the management of your assets (both direct and indirect) are checked for market conformity and efficiency in order to identify potential savings. All settlements are checked for correctness (best practice principle).

A partner for our costumers

The companies of the swisspartners Group offer comprehensive and professional services for discerning private clients in Switzerland and abroad. We see our clients as partners with whom we want to grow together. Openness and transparency are central pillars of our philosophy. We always treat our clients with the highest esteem.

Responsibility

We are convinced that long-term entrepreneurial success can only be based on responsible action - towards our customers, society and, of course, our employees. A sense of responsibility is one of the pillars of our success.

Modern Swissness

As a financial boutique based in Zurich with branches in in Rapperswil and Vaduz, we embody a modern interpretation of Swissness. At the swisspartners Group, tradition, fairness and reliability are combined with a forward-looking approach, team spirit and entrepreneurial flexibility.

Performance-monitoring

The aim of this analysis is to assess the performance of the managers to whom you have entrusted your assets - both in absolute terms and relative to peer groups or defined benchmarks. Performance attribution aims to identify sources of return and link these to active decisions made by the portfolio manager.

Further analysis

We offer customized analyses according to individual needs and support clients in assessing their risk profile and determining their strategic asset allocation across entire portfolios. We also have expertise in the areas of real estate and art.

swisspartners Group

As one of the most renowned independent Swiss financial services providers, the swisspartners Group has been serving international private clients since 1993. Around 100 specialists in our offices in Zurich, Rapperswil and Vaduz develop customized solutions in the areas of traditional wealth management and comprehensive asset structuring.

The swisspartners Group consists of:

- swisspartners AG, Zurich - an SRO-regulated asset management company.
- swisspartners AG, Vaduz - a Liechtenstein company offering wealth management services to European clients.
- swisspartners Advisors Ltd - an SEC-registered company providing asset management services to US-based private clients.
- swisspartners Versicherung AG, Vaduz - offers unit-linked life insurance for clients in various countries.
- swisspartners Xperts AG - provides traditional fiduciary and family office services to clients based in Switzerland.