

Asset Management



We assist wealthy individuals in planning and implementing a sustainable investment strategy. Our experienced team provides you with an accurate overview and realises your goals for securing, increasing or optimising your wealth.

HOW WE ASSIST YOU

Analyzing your requirements and defining your personal risk profile stand at the outset of our advice and asset management services. A careful evaluation and mutual consensus in defining your investment profile are important prerequisites of any investment strategy.

Thanks to our extensive national and international network we are always up-to-date on current market developments. Based on a structured analysis and prudent risk assessment we continuously review your investment strategy and lead it to sustained success.

YOUR ADVANTAGES

As independent asset managers we are free from conflicts of interest and able to choose investments based solely on your personal goals. The investments are constantly reviewed and adapted to the strategy that is based on your wishes and needs.

The growth and the management of your own assets requires a lot of professional know-how and time. Our experts assume this task for you, providing you with an asset management tailored to your personal circumstances. So that you can rest assured that your investment portfolio is in good hands.

OUR SERVICES

We advise you on your own investment decisions or take responsibility for the discretionary asset management. From the consolidation, analysis and overall view of your assets to the investment strategy, regular reports and summaries on the development of valuations.

- Structured analysis of the investment horizon and your specific requirements in accordance with your personal circumstances.*
- Evaluating the risk appetite.*
- Developing the investment profile and investment strategy according to your personal preferences.*
- Continuous monitoring of the various relevant markets and news.*
- Comprehensive advice for your own investment decisions. Monitoring the correct execution of transactions by the bank.*
- Assuming the entire banking tasks from opening a bank account to monitoring the transactions and bookings as well as portfolio control.*
- Regular information on and, if desired, assessments of your asset valuations with various banks.*
- Independent risk analysis and assessment of the investment strategy as well as control of the performance of various asset managers.*