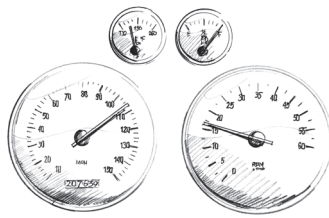


Portfolio Health Check



We assist private individuals in checking and assessing whether their investment portfolio is aligned with their personal risk profile. As independent experts we provide security and confidence in financial affairs.

HOW WE ASSIST YOU

The complexity of the markets and investment products is growing continuously. Simultaneously the need for transparency in asset management is rising. Therefore an independent assessment to check whether your existing portfolio is aligned with your current situation and personal risk profile, is crucial.

Based on your personal aims and needs, we jointly develop a short, medium and long-term target asset allocation and define a suitable balance between risk and yield in your portfolio.

YOUR ADVANTAGES

A regular review of your portfolio requires specific financial know-how. Let our experts assume this task for you and provide you with an objective overall view. We will guide you independently and reliably through the world of the financial markets.

With its longstanding experience in asset management our well-established team provides you with the necessary overview. We care for the success of your portfolio.