

Independent Consulting for Private Investors

- » Investing like a professional investor
- » Independent selection of the most suitable asset managers
- » Constant monitoring of investment success and costs

Are you interested in investing your assets like a professional? We help you to define a tailor-made and efficient strategic asset allocation, assist you with a cost-efficient implementation and guarantee professional monitoring as well as benchmarking of the investment results. We are fully independent and act solely in the interest of our clients.



Optimal investment strategy

We determine the strategic asset allocation that is most suitable for you while taking into account your investment goals and your risk capacity.



Selection of banks and asset managers

We support you in the selection of banks and asset managers, draft investment guidelines and negotiate contracts for you.



Investment controlling

Our ongoing independent assessment of the investment results and asset managers helps you to identify any need for action.



Fee analysis

We assess your asset management and custodian fees and reveal any hidden costs.



Portfolio check

We independently assess your current portfolio regarding performance, costs and risks.



Independence

We are not an asset manager and are paid only by our clients (all-in fee or hourly wage). You are free to pick any of our services – regardless of the size of your assets.



Cost and performance comparisons

We advise more than 200 investors with assets of over CHF 400 bn. This enables us to provide comprehensive cost and performance peer groups.



Contact

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