

Individual needs – a common goal

Wealth management is a person-to-person affair. It's a question of trust, relationships and a common goal. Our clients' trust is our greatest commitment. That's why we do what we do with the utmost diligence, due deliberation and conviction, striving for long-term success for our clients. Our tools are our proximity to clients and markets, years of experience coupled with comprehensive expertise, and last, but by no means least, our enthusiasm for our work.

✓ Strategic asset advisory services

Sparring partner for all financial matters

✓ Wealth management

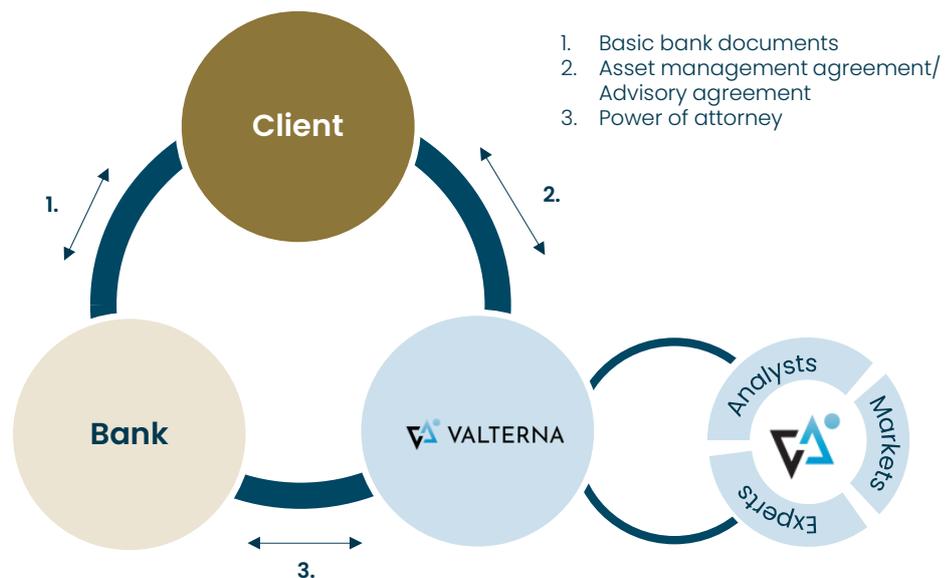
Full delegation of all investment decisions

✓ Investment advisory

Actively creating decision-making foundations

✓ Network

Broad range of network services with the involvement of specialists



Our vision

As a unique financial service provider, we inspire people.

Our mission

We optimize the financial well-being of our clients through individual investment solutions, excellence in holistic advice, and continuity in support.

Our service promise

We create and live values

- Partnership
- Foresight
- Modern
- Ethically responsible

Our impact for clients

- Client- and market-oriented
- Completely independent
- Transparent
- Innovative and competent

Transparent and straightforward fees

Our fees are clearly and transparently calculated and displayed.

No proprietary products

With no in-house products, we are free of conflicts of interest and hidden costs.

Our retrocessions policy

Retrocessions are fully passed on to our clients since our founding.

Net performance

We present actual net performance after deduction of all fees.

Favorable partner conditions

Very competitive bank fees thanks to selected partnerships.

Private market investments

Preferred access to private market investments, lower minimum investments, cost advantages.

