

Our company founded in 1986, is active in Wealth Management in Switzerland. We work with well-known first-class Swiss based Private Banks for offering our clients an adapted solution based on their requirements and needs. Our team of investment professionals offers centralized and tailor-made portfolios to clients.



#### Key Facts

Founded:	1986
Head Office:	Geneva - Switzerland
Shareholders:	Privately Held
Business areas:	Wealth Management Account Opening Portfolio Management Advisory & Discretionary

#### Activities

**Wealth Management:** The company signed agreements with first class custodian banks allowing wealth management activities for private clients and corporate clients wanting to not only benefit from a flexible approach and a traditional portfolio management solution, but also from advice through a specialised boutique focused on alternative investment solutions.

**Global Advisory:** Our team gained knowledge through the years and via different companies in developing additional skills and fields of expertise. Therefore, using our global network and in-house knowledge, we propose you to understand your needs and to assist you in collaborating with close partners when it comes to M&A Advisory, Corporate Services or Funds Services for facilitating your experience and the overall communication.

#### Languages for services

- French
- English
- Russian
- Chinese
- Spanish
- German
- Italian

#### Regulation

The Company is regulated by the FINMA, our Swiss Financial Market Supervisory Authority.

Our Supervisory Organisation is AOOS.  
Our Ombudsman is OFS.

#### Contact Details

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