

# Accessible Swiss Wealth Management For Americans

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Managing Partner at WHVP





# Content

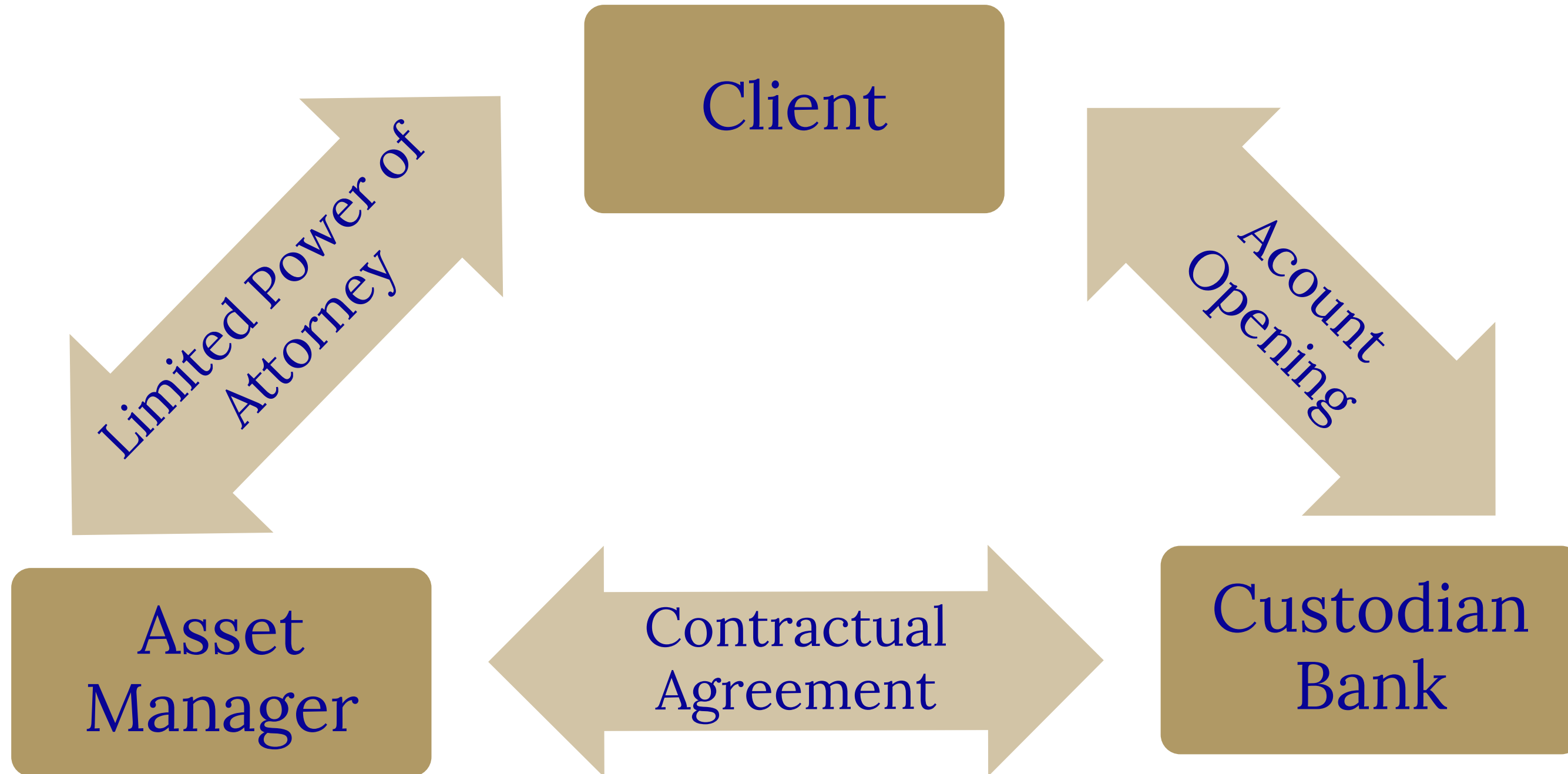
- Working with an Independent Asset Manager
- Offshore Investing
- Switzerland as a Jurisdiction
- Working with WHVP



# Introduction

- Managing Partner at WHVP
- 10+ years Experience in Financial Industry
- 5+ of which in the Cross-Border Business
- Bachelor Degree in Banking & Finance
- MBA from the University of St. Gallen
- Co-Author of «Swiss Money Secrets»

# The Set-Up





# Working with an Independent Asset Manager

- Independent Partner
- «Fiduciary Standard»
- Personalized Service
- Direct Access to Owners
- Continuity
- Focused Specialization
- Choice of Custodian Bank
- Lower Minimum Size
- Broad Network of Partners



# Benefits of an Offshore Bank Account

- Geographical diversification
- Different portfolio emphasis
- Added layer of asset protection
- Enhanced privacy protection
- Protection against a sinking domestic currency
- Enhanced overall stability



# Challenges of an Offshore Bank Account

- Costs
- Paperwork
- Finding a competent partner
- Distance and time difference



# Switzerland as a Financial Jurisdiction

- Long History and track record
- Exceptional education system, professionalism, integrity
- Wealthy nation with high reserves and low debt
- Economical stability
- Political neutrality
- Strict federal laws and regulations
- Deposit protection scheme
- Swiss franc as a safe haven currency





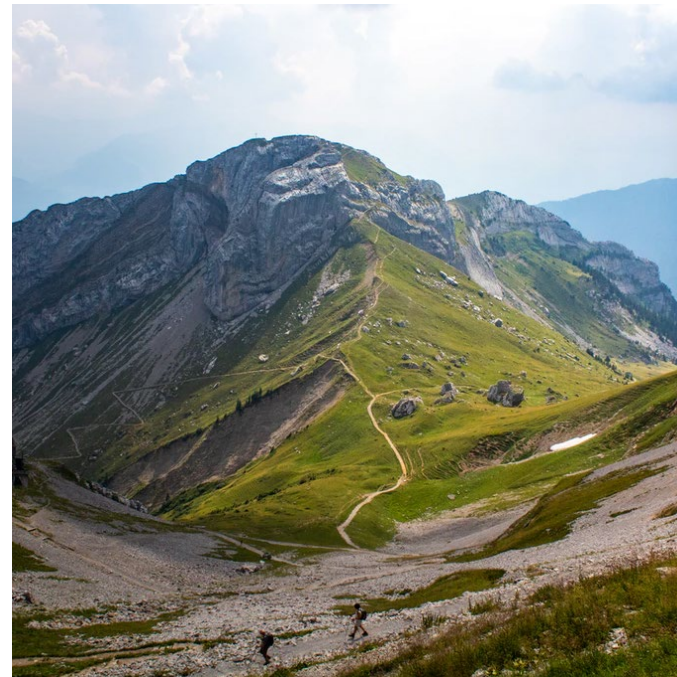
# The Process

- Introduction call or video meeting
- Deciding service, bank and account type
- Providing basic information about background, finances, residency and passport copy
- Receipt of account opening set
- Bank opens account
- Account ready to be funded
- Call to talk about investment
- Ongoing communication

# Introducing Our Services

## Pilatus - Permanent Portfolio

Wade into the waters of international diversification with a standardized moderate investment portfolio.



## Eiger - Asset Management

Profit from international diversification with a tailor-made investment portfolio at the custodian bank of your choice.



## Dom - Concierge Level

Investment strategy tailored through a personalized service. Gain access to our concierge services and a yearly personal visit.



All services available for personal accounts, joint accounts, individual retirement accounts, trusts, LLCs and foundations.

# Overview of Services

	Pilatus	Eiger	Dom
Minimum	\$ 250'000	\$ 500'000	\$ 1'000'000
Management Fee	1%	1.5%	1.5%
Additional Flat Fee	n.a.	n.a.	CHF 10'000
Call / Virtual Meeting	Yearly	Up to Quarterly	Up to Quarterly
Personal Relationship Manager	✘	✘	✘
Guidance through Account Opening Process	✘	✘	✘
Online Banking Access	✘	✘	✘
Quarterly Statement	✘	✘	✘
Quarterly Report	✘	✘	✘
Tax Statement		✘	✘
Tailor Made Strategy		✘	✘
Free Choice of Preferred Custodians		✘	✘
Yearly Personal Visit at City of your Choice			✘
20h Concierge Service per Year included			✘

# Partner Banks

kaiser.partner

Responsibility in Wealth

- Founded in 1977 in Liechtenstein
- AuM: 4 bn CHF
- Tier 1 Core Capital Ratio 22%
- Awarded „Best Private Bank in Liechtenstein“ five times in a row

Vontobel

- Founded 1924 in Zurich
- 21 locations
- Still family owned
- Solidarity, stability and trust
- AuM: 195.4 bn CHF
- Best Swiss Private Bank (2016)

 WIENER PRIVATBANK

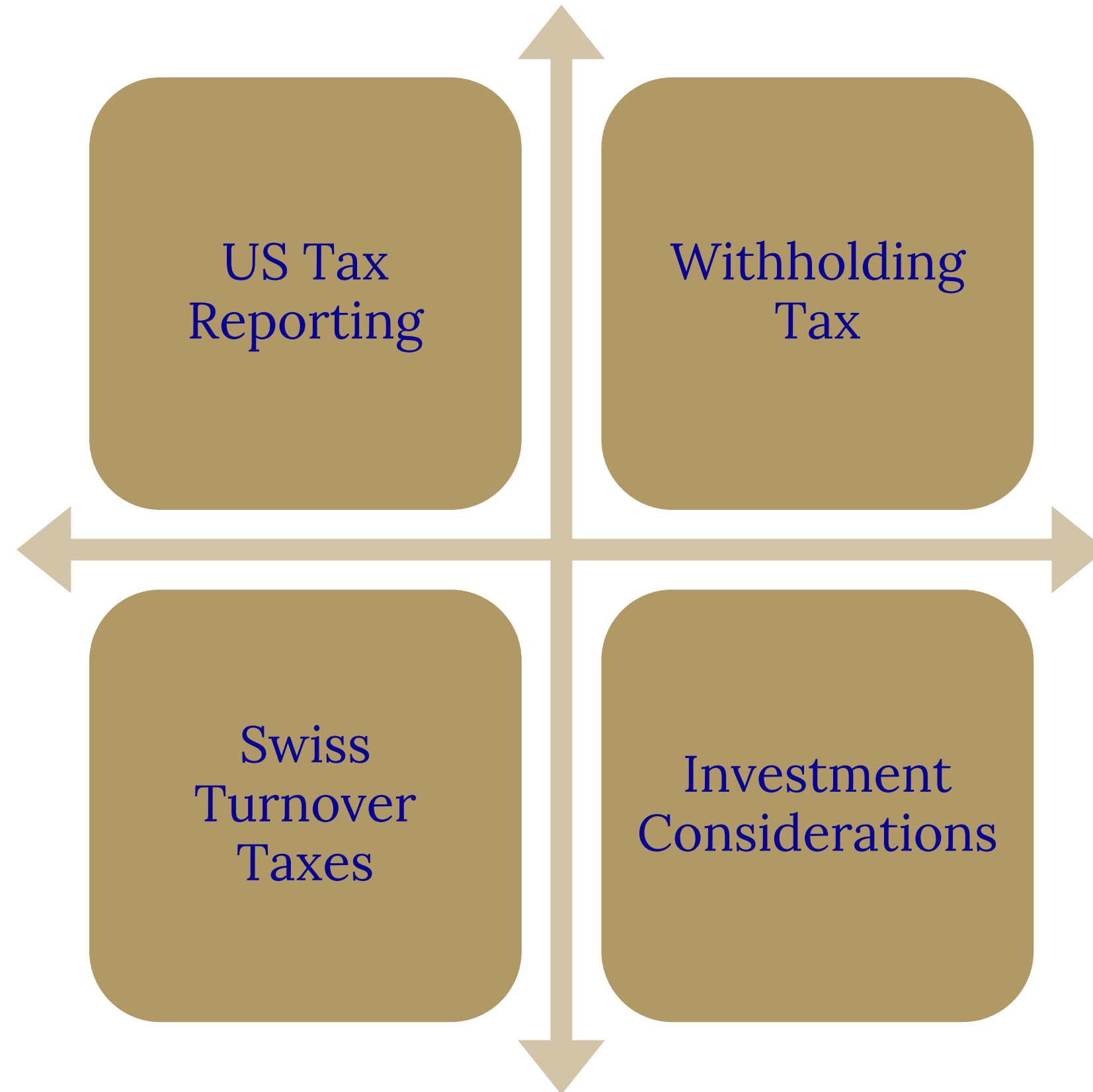
- Founded in Vienna
- Independent & entrepreneurial
- Transparency and an extremely solid financial basis
- AuM: 2 bn EUR
- Tier 1 Capital Ratio 15.51%



# The Investments

- Conservative, long-term oriented capital preservation strategies
- Exclusion of US market and USD investments
- Direct investments into stocks, bonds, precious metals and foreign currencies
- Stock selection: Country and currency assessment, industry attractiveness, company attractiveness, investment opportunity

# Tax Considerations



A large graphic of the Swiss flag, featuring a white cross on a red background, is positioned in the top-left corner of the slide.

# SWISS MONEY SECRETS

*Robert E. Bauman JD  
Jamie Vrijhof-Droese*

## Free E-Book!

Send an email to [info@whvp.ch](mailto:info@whvp.ch) in order to receive your free copy of “Swiss Money Secrets” today.

The book covers Switzerland in terms of:

- History, politics, government and economy
- Banking industry, investing and asset managers
- Taxes, legal entities, residence and citizenship