

ADDITIONAL ADVISORY SERVICES

Advice on the definition of investment strategies

Advice on the selection of asset managers

YOUR NEEDS

You require professional assistance to define your personal investment strategy.

You require neutral and professional advice as well as support in the selection of asset managers who are mandated to manage your assets.

OUR SERVICES

- > We advise you on the definition of your investment strategy, taking your individual requirements into consideration (e.g. investment objectives, risk capacity and risk tolerance, investment horizon).
- > If required, we advise you on the application of overlay instruments (e.g. forward foreign exchange transactions, futures).
- > Periodic review of investment strategy
- > We support and advise you on the selection of asset managers.
- > We prepare a list of asset managers meeting your individual requirements.
- > We organise presentations with potential asset managers in which they present their investment style and implementation approach.
- > We support you in the selection process.

YOUR BENEFITS

- > You receive an investment strategy tailored to your individual needs.
- > You receive our professional support in the selection of asset managers.
- > You find your ideal asset manager.