

VONTOBEL

## Swiss Values for U.S. investors

SEC registered

Vontobel Swiss Wealth Advisors



# We stand for high quality services



**Deepak Soni**, CEO of Vontobel Swiss Wealth Advisors AG

## Swiss strength, global outlook – and American perspective

Headquartered in Zurich, Switzerland, the world's capital of Private Banking, Vontobel Swiss Wealth Advisors is a wholly-owned subsidiary of Vontobel, family-owned since 1924. Vontobel Swiss Wealth Advisors is dedicated to the needs of US investors.

At Vontobel Swiss Wealth Advisors, a team of seasoned investment professionals will identify investment opportunities and products for you that span the globe. Multi-currency solutions are part of our toolkit, providing you the

benefits of global diversification with optimal risk management.

We understand the needs of American investors. Registered as an Investment Adviser with the US Securities and Exchange Commission (SEC), our company combines all the benefits of US compliance with the qualities that make Swiss banking legendary around the world: strengths such as stability and continuity, service excellence, global reach, integrity and confidentiality.

**“Dedicated to the needs of US investors, we combine Swiss values with global market expertise to provide you with international diversification.”**

In short, our clients benefit from our ability to customize wealth management solutions to meet their individual investment requirements. In addition, as a Swiss financial services firm, Vontobel Swiss Wealth Advisors provides clients security and financial privacy.

### Investment minimums

Investment Management Program: CHF 750,000  
Client Directed Advisory Program: CHF 1,000,000

## Vontobel – Performance creates trust

Vontobel's mission is to protect and build the wealth our clients have entrusted to us over the long term. Specialising in active asset management and tailor-made investment solutions, we provide responsible and forward-looking advice. In doing so, we are committed to Swiss quality and performance standards. With their good name, our owner family has stood by these principles for generations. Around 1,400 employees worldwide provide first-rate, customized services for clients with an international focus. The registered shares of Vontobel Holding AG are listed on the SIX Swiss Exchange. The Vontobel families and the Vontobel Foundation hold the majority of shares and votes in the company.



Head Office of Vontobel

# We strive for client satisfaction

## Our solutions

Dedicated to US investors, Vontobel Swiss Wealth Advisors represents one of the select few Swiss financial institutions which was specifically established to meet the legal and regulatory requirements of investors who are US citizens or residents. With significant international investment experience, we are able to offer our clients key portfolio services and benefits in the following areas:

- Investment Management Program
- Client Directed Advisory Program
- Multi-currency capabilities
- Global diversification
- Geographic separation of our clients' assets
- US tax reporting as required by US law

### Discipline and diversification

Our transparent and disciplined investment process allows us to identify investments from a global universe of possible solutions and select the ones that will best meet your personal needs. Vontobel Swiss Wealth Advisors will provide you the dual benefits of global diversification within your portfolio plus geographic separation of your assets with us. With this geographic separation, the custody of your assets is in Switzerland, a jurisdiction of unmatched political and economic stability. For our clients, this means added peace of mind which is truly valuable during uncertain times.

### Our Wealth Management approach

Vontobel Swiss Wealth Advisors follows an active investment philosophy. We utilize first-class research capabilities alongside a structured and disciplined investment process – all while actively seeking to identify opportunities presented by the markets.

Our experienced investment specialists are responsible for managing your assets. Based on your personal investment objectives, and taking due account of your individual risk tolerance and risk capacity, we devise and implement a personal investment strategy for you. Individual investments are then evaluated by our team of investment experts. As our private client, you also benefit from the knowledge and expertise of Vontobel.

Our investment management offering at Vontobel Swiss Wealth Advisors comprises different investment strategies that reflect your personal objectives and risk profile. Our flexible investment approach leads to tailored solutions for our clients.

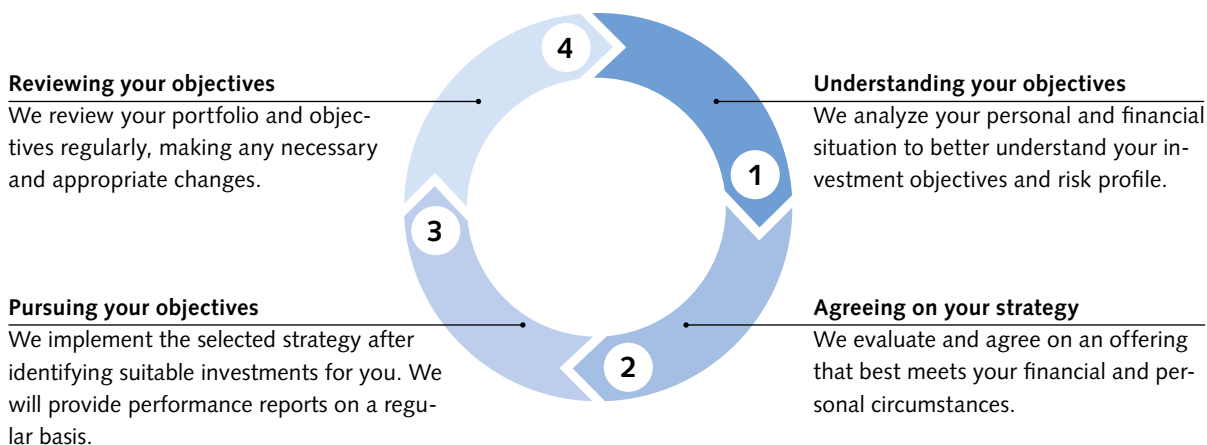
## Our advisory process

### It's all about you

Vontobel Swiss Wealth Advisors places exceptional importance on the client relationship. We value our discussions concerning your personal situation, life circumstances and objectives.

### From analysis to solutions

We strive to find a personalized solution for you. Together we will define a solution that best meets your needs.



# At the hub of Swiss Private Banking – how to reach us

## Main Office

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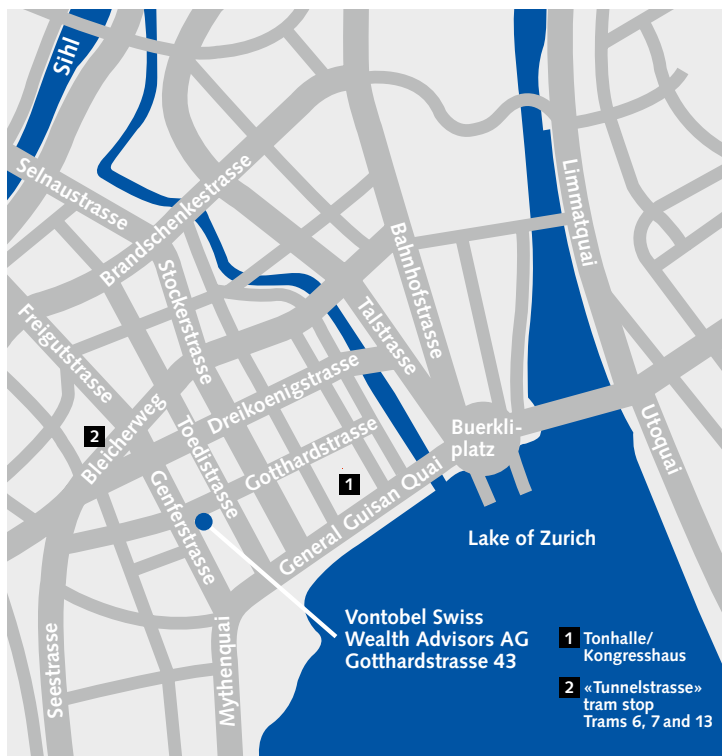
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Performance creates trust

## Legal information

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