

Together let's  
build your future

## Family office services

We help you and all your family members manage and administer your family wealth from a holistic perspective.

### Our services

#### Arranging your wealth

We have the framework you need to manage and protect your personal and real estate wealth for generations to come. We help carry out estate planning and asset transfers in accordance with your family values and charter.

#### Support for non-financial assets

We can advise you on buying, selling, financing and maintaining your real estate assets. We can also help you buy or sell a business.

#### Comprehensive wealth planning

Our consolidation system encompasses all types of assets, from conventional investments (such as equities and bonds) to non-traditional assets (for example, real estate, artworks, private equity and cryptocurrencies). Having this comprehensive view eliminates potential cluster risks from your portfolio.

#### Keeping information in one place

We offer storage and archiving for important items such as your insurance policies, original paperwork, passwords, confidential information, or whatever you'd like to keep safe with us.

#### Precise monitoring of strategy and access rights

We oversee your strategy and supervise the agents responsible for managing your portfolio. With your agreement, members of your family may also participate. By controlling access rights, we can ensure full privacy of information.

### Our customised solution

#### Holistic perspective

We offer a comprehensive, focused wealth planning service that analyses your assets comprehensively, regardless of complexity or number of custodians.

#### Providing peace of mind for your family now and educating future generations

Our vision extends beyond the current generation. It is about supporting you for the long term. We involve your family members in the way your wealth is managed, according to each person's needs.

#### Customisable asset reporting

Our reports are a useful tool for strategic decision-making by listing your transactions and providing an accounting record of your securities holdings. Our reports can be fully customised to suit your preferences. Detailed yet streamlined, they will easily demystify complex situations.



#### Votre contact

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Our comprehensive range of 360° services ↓

Investments

Wealth planning

Financing advisory

**Consolidation and  
multi-bank management**

Property services

Mergers and  
acquisitions



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## Multi-bank consolidation services

Wherever your assets are held, we offer an integrated solution that brings them all together in one multi-bank consolidation resource.

### Our services

#### Comprehensive wealth planning

Our consolidation system encompasses all types of assets, from conventional investments (such as equities and bonds) to non-traditional assets (for example, real estate, artworks and cryptocurrencies). Having this comprehensive view eliminates potential cluster risks from your portfolio.

#### Customisable asset reporting

Our reports are a useful tool for strategic decision-making by listing your transactions and providing an accounting record of your securities holdings. Our reports can be fully customised to suit your requirements. Detailed yet streamlined, they will easily demystify complex situations.

#### Precise monitoring of strategy and access rights

We oversee your strategy, supervise the agents responsible for managing your portfolio and monitor its performance. With your agreement, members of your family may also participate. By controlling access rights, we can ensure full privacy of information.

### Our customised solution

#### Independent, seasoned advice

Our many years of experience enables us to help you effectively manage your personal and real property wealth, supported by our team of financial, property and tax specialists.

#### Providing peace of mind for your family now and educating future generations

Our vision extends beyond the current generation. It is about supporting you for the long term. We involve your family members in the way your wealth is managed, according to each person's needs.

#### Keeping information in one place

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