IFS Independent Financial Services

«Defensive» investor type

We can also compete defensively thanks to the following solutions. A comprehensive service or as part of your overall strategy.

We offer you:

Asset management

Are you looking for an active wealth manager that focuses exclusively on investing your assets? Based on your specifications, we will tailor our wealth management services to your individual needs. As a FINMA-regulated manager of collective investment schemes, we also manage occupational pension assets, including vested benefits capital, non-mandatory occupational «1e» assets and pillar 3 assets.

We take care of all your investment decisions.

Investment advisory «Active Advisory»

Are you interested in developments on the financial markets and keen to play an active role in investment decisions but grateful for the advice of a proven specialist? We help you to invest your assets in line with your preferences.

We advise – you decide!

Mario Almer
Member of the Executive Board

„Our independence means we can offer you bespoke solutions.“

IFS Independent Financial Services

Multi-asset strategies

IFS Balanced

- Investment approach derived from our successful investment strategy that has been in place for many years.
- Investment fund under Swiss law that complies with the Swiss Occupational Pensions Act (OPA) and Occupational Pensions Ordinance (OPO2).
- Multi-asset strategy combining a balanced investment strategy and an active investment approach (regulating the equity weighting between 0 and 50 per cent).

Bond strategies

IFS Fixed Income

(Actively managed certificate with Bank Julius Baer)

- The strategy invests exclusively in bonds with at least an «A» rating.
- The investment universe comprises foreign currency bonds, hybrid bonds, convertible bonds and government bonds as well as cash (up to 100 per cent).

Equity strategies

IFS Systematic Equity Income

(Actively managed certificate together with UBS Inc.)

- A strategy that generates returns by systematically selling put options on US and European large caps.
- Call options on two broad-based indices, the S&P 500 and the Eurostoxx 50, can also be sold to reduce the equity market risk.

IFS Independent Financial Services

Your specialists

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Contact us for a one-to-one conversation.