IFS Independent Financial Services

Family Office Services

Are you looking for help in managing your family‘s assets? Together we will develop individual investment principles and transfer them into a robust system strategy. With the help of a innovative software solution we consolidate your assets and give you an overview of your investment and liquidity situation. Furthermore, we also support you in liquidity management and other administrative tasks. We support you in setting up your own family office and provide a needs-based and functional design and regular optimisation of the investment organisation (structure and processes) safe.



IFS Independent Financial Services

Our Family Office Service offers you

Support in setting up

- Together we work on the family tailored investment principles and investment targets and convert them into a robust investment strategy
- We support you in designing and regular optimization of a appropriate and efficient investment organization (structure and processes).
- Together we define and design a needs-based and meaningful Investment and risk reporting.
- Advice on the compilation of a network of external specialists for Issues such as taxes, succession or structures.

Investment implementation

- Transparent and independent monitoring in the search and selection of suitable Investment opportunities.
- Support with individual design and structuring of investment ideas and efficient implementation.
- Selection of external managers in framework of beauty contests and on the basis of a jointly defined «catalogue of requirements».
- Ongoing investment and performance controlling including the definition of adaptation measures.
- Access to a wide range of innovative investment opportunities and strategies for both liquid and illiquid investments.

Advice and support Invest-ment strategy and tactics

- Advice on the determination of the invest-mentobjectives and one based on the risk preferences of family oriented investment strategy.
- Advice and support for the responsible committees for decisions on tactical allocations and to concrete Implemen-tation issues.
- We support you in the definition and Im-plementation of a suitable risk management system management concept.
- Ongoing review of the asset management allocation including identification the necessary adjustments.

Consolidation & Reporting

- Consolidation of all assets (including long-term investments in tangible assets such as real estate and not liquid private market investments such as private Equity).
- Access to an innovative consolidation tool with intuitive mobile applications and individual authorization control for different user groups (tax consultancy, real estate experts etc.).
- Periodic and customer-specific Preparation and presentation of the assets.

Heinz Zimmermann
Member of the Executive Board

„Support through continuity of care we have a long-term relationship with our clients.“

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Other services

- → Support for liquidity management within the existing bank setup.
- → If required, we can take over the management of payments and of Commitments for private market investments.
- → Controlling your contractual partners with regard to Compliance with the contractual basis (fees etc.).
- → Assistance with general administrative Tasks.

Your specialists



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Contact us for a personal conversation.
We will give you an overview.