

Institutional clients advisory

On the hunt for traditional and opportunistic investment ideas and themes being implemented in a targeted way? We offer comprehensive advice and tailored investment solutions. Professional advice and personal support from experienced specialists are at the heart of the services we provide.

We offer you:

Investment strategy and tactical allocation

- Advice on setting your investment objectives and an investment strategy aligned with your risk capacity and risk appetite.
- Second opinions on existing strategy and ALM studies.
- Advice from the competent bodies (e.g. investment committees) on decisions relating to tactical allocations and on specific implementation issues.

Pooling investment ideas and interests

- Thanks to our broad-based network of investors and service partners, which has been in place for many years, we help to pool similarly aligned investment ideas from different investors and provide support in choosing the right partners. This presents the investor with transparent, attractively priced investment solutions and co-investment opportunities.
- We act as broker between investors and suitable suppliers on individual transactions (e.g. real estate investments).

Investment solutions for risk-controlled investing

- Comprehensive support for investors with a limited risk capacity or low risk appetite.
- Advice on defining a suitable risk management strategy and implementing individual solutions as part of management mandates or collective investment schemes.

Prompt, efficient structuring

- Helping discerning investors to customise and structure investment ideas to their tastes.
- Turning specific investment ideas into reality swiftly and as cost-effectively as possible thanks to many years' experience and an extensive network of proven specialists.

Designing and optimising your investment structure

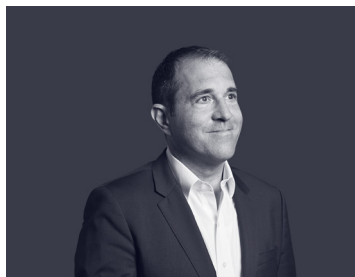
- Helping discerning investors to scope out how their investments are organised (structure and processes) and undertake regular fine-tuning.
- Advice on setting up informative investment and risk reports.
- Transparent and independent assistance with sourcing and selecting suitable investment opportunities and asset managers.

Your specialists



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Contact us for a one-to-one conversation.

We advise – you decide!