IFS Independent Financial Services

Wealth management

Looking for an active wealth manager that will focus exclusively on investing your assets? Based on your personal specifications, we'll tailor our management of your assets to your own individual needs. As a FINMA-regulated manager of collective investment schemes, we also manage occupational pension funds.

Our wealth management offers you:

Strategy mandates

→ Tailored individual allocations or based on a predefined risk profile (Dynamic, Balanced and Conservative, upwards of CHF 1 million).

→ Optional: mandates can be combined with the DPIM capital protection mechanism and will minimise the maximum losses over a twelve-month period.

→ Our balanced strategy fund for managing occupational pension assets complies with the Swiss Occupational Pensions Ordinance (OPO2) and is a low-cost variant for assets under CHF 1 million.

Tailored mandates

→ Active equity mandates (direct investments, ETF mandates or funds).

→ Passive equity mandates (benchmark mandates) with low-cost ETFs.

→ Plus pure fixed-income strategies on request.

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Custody account check

→ A non-binding review of your custody accounts.

→ Our assessment of your current investment situation in terms of your risk profile, including a brief evaluation and specific proposals for optimising your portfolio.

→ A critical review of your terms and conditions, furnishing specific options for optimising them.

Our service

→ Investment approach backed by many years of success.

→ A direct line to your portfolio manager.

→ Monthly reports.

→ Tailored prices (fixed or performance-based).

→ Free choice of custodian bank on preferential terms.

Your specialists

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Contact us for a one-to-one conversation.
We take care of all your investment decisions.