

# Wealth Engineering

## Your success is our mutual goal

As a wealthy person, do you rightly expect to receive tailor-made solutions? Our specialized Wealth Engineering team advises you in all aspects of your financial matters – reliably and competently.

Wealth Engineering addresses the need of private clients, companies and top managers for finely tailored advisory and wealth-structuring solutions. It encompasses VP Bank's Wealth Consulting, Investment Engineering and Portfolio Management Enhanced services, which together form a value chain that can also be attuned to the client's specific requirements.

## Wealth structuring – our range of services

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### Wealth Consulting:

- A-to-Z wealth consulting that takes into account financial investments as well as "locked-up" assets; portfolio analyses as well as consolidated asset allocations that also factor-in less liquid holdings (e.g. real estate, corporate interests)
- Advice and accompaniment in significant restructurings of the overall base of your wealth (e.g. in the case of a sale of real estate, change of domicile or matters relating to succession planning)
- Advice on all issues relating to concentrated holdings in specific companies

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### Investment Engineering:

- Natural and legal persons
- Jointly formulated definition of your personalized investment strategy
- Optimization of your portfolio by means of our modern econometric models

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### Portfolio Management Enhanced:

- Seamless implementation of the investment strategy that best suits your needs and risk profile within the framework of a personally specified portfolio management mandate
- The use of liquid financial market instruments in the implementation of the investment strategy; at your request, your basic investment strategy is supplemented with innovative strategies aimed at optimizing the risk/reward ratio of the entire portfolio (according to the so-called core/satellite principle)
- Coordination of the assets that have been entrusted to various third-party asset managers, and assumption of responsibility for centralized topics relating to portfolio management ("overlay management")
- Compilation of individualized account statements/reports



Wealth Engineering is a joint effort of experienced specialists from VP Bank's areas of Financial Engineering, Portfolio Management, Corporate Finance, Taxes and Project Management.

### Why VP Bank?

Clients from more than 60 countries value our expertise in providing comprehensive investment and wealth management advice. Our Wealth Engineering specialists are highly competent partners for all issues that pertain to your personal financial holdings.

#### Contact

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