

Zurich, April 22nd, 2020

Choosing a Swiss financial adviser - simplified

When it comes to choosing a foreign financial adviser to help with the geographical diversification, asset protection, and international investing one needs to look at important factors such as service offerings, performance, management fees, just to name a few. On the other hand, considering markets like Switzerland, those underlying factors might be similar and even identical from one SEC RIA to the next. There are a number of financial advisors in Switzerland, registered with the SEC, who are in the identical business of providing long-term capital preservation options and geographical diversification to Americans with the same custodian banks and within somewhat similar management fee schedules. This begs the following question – if all those underlying factors are basically the same, then what would a potential client look at when making his or her choice whom to trust with his or her money outside of the US.

The answer, right off the bat, is that just as at home, it comes down to the human connection. The interpersonal relationship one forms with his or her financial adviser is even more important when the distance is greater, the time zones different, and the language barriers put limits. But at the end of the day, it is this relationship that drives many of the financial decisions for the long-term capital preservation and diversification of your wealth. That's why it's imperative to look at the things that qualify your adviser using your own personal criteria.

A combination of experience, professional accreditation, as well as background, interests, and character are some of the building blocks that create a long-term relationship. It is for those reasons that swisspartners Advisors (SPA) greatly differs from its competitors. We have a truly international team with a combined experience of over 100 years in private banking, investment management, and law. The team at swisspartners Advisors comes from different walks of life and each member brings their personal values and experience only to focus on establishing a good working relationship with the clients. This has been at the core of SPA's philosophy since the moment of its establishment.

swisspartners
Advisors Ltd.

Am Schanzengraben 23
P.O. Box | CH-8022 Zürich
Phone +41 58 200 0 800
toll free Phone US +1 888 772 5 830
info@swisspartners-advisors.com
SEC file No 80169940 | CHE-114.529.632
swisspartners-advisors.com

As part of swisspartners Group – one of the biggest and oldest independent investment management companies by assets under management and number of clients in Switzerland – SPA has been assisting US clients since 2008. With its well-established network from coast to coast throughout the United States, swisspartners Advisors has and continues to embrace long-lasting relationships with industry leaders to bridge the gap between Switzerland and the US. The ground covered noticeably distinguishes SPA from the others because it makes it easy and efficient for clients to bank in Switzerland without leaving their city, town or even home. Moreover, with the significant time spent in the US, it makes it much more accessible to clients to speak face-to-face with their adviser at a moment's notice. SPA has the specialists at hand to make this work – from taxation and estate planning to asset protection or just reporting.

swisspartners Advisors is a trusted partner to attorneys, law firms, and family offices across the fifty states as the go-to solution for US clients looking to take advantage of Switzerland's long-standing traditions of wealth management. As part of its established relationships with Switzerland's leading names in banking, SPA has set in place custody and commission contracts that are not only competitive but also highly attractive and unique. They are improved and re-negotiated regularly to reflect the current market and investment environment. As a result, clients have a wide range to choose a custodian bank, which in turn makes SPA a truly independent investment boutique. This allows to focus exclusively on asset management and better positions SPA to perform in an unbiased fashion aligned with the clients' goals.

The exceptionally diverse expertise, experienced team, unique connections with industry leaders, continuous time on the ground, and unparalleled service offerings are only some of the reasons that strongly differentiates swisspartners Advisors from the rest of SEC RIAs in Switzerland. It is only through first-hand experience that one would be able see the benefits of working with SPA and having the peace of mind that your money is in safe hands.

Author:
Michael Donev, Esq.
Financial Adviser