

Accessible Swiss Wealth Management For Americans

Presented by Jamie Vrijhof-Droese,
Managing Partner at WHVP



Volatility Index



CBOE Volatility Index



Content

- Working with an Independent Asset Manager
- Offshore Investing
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- Working with WHVP

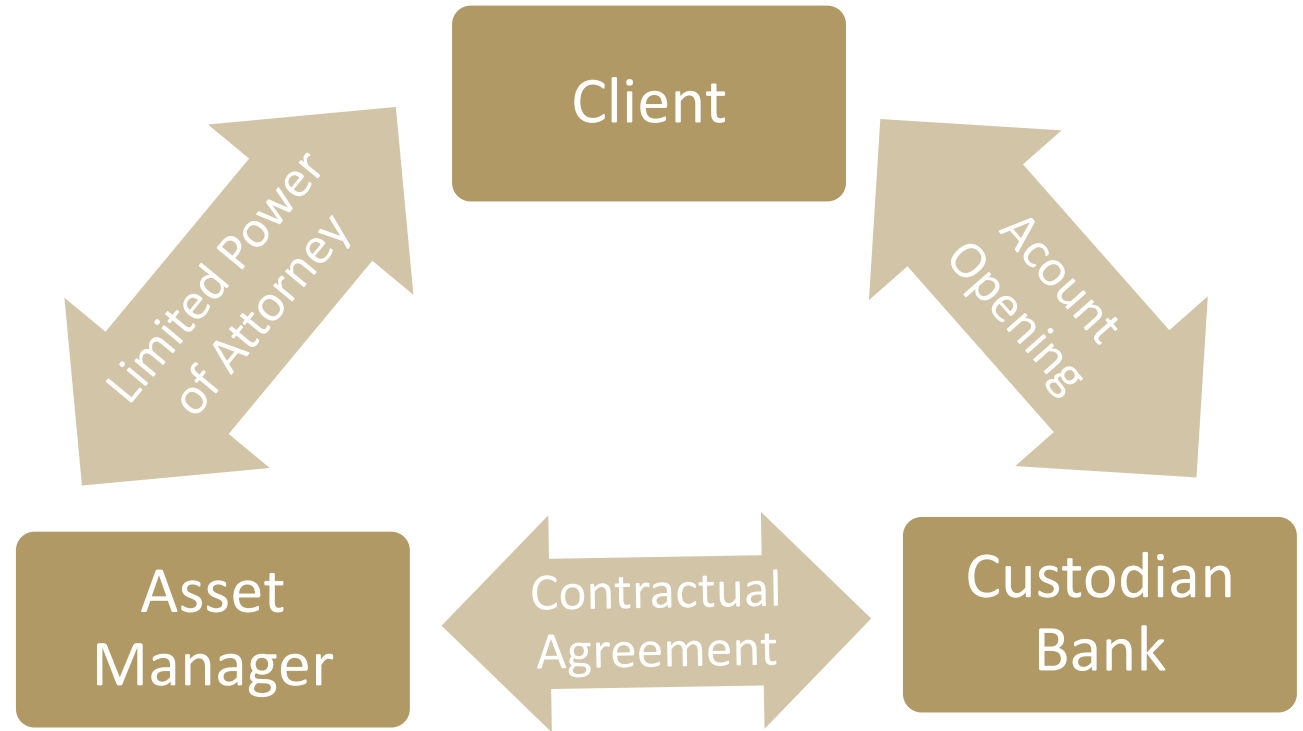
Introduction



- Managing Partner at WHVP
- 10+ years Experience in Financial Industry
- 5+ of which in the Cross-Border Business
- Bachelor Degree in Banking & Finance
- MBA from the University of St. Gallen
- Co-Author of «Swiss Money Secrets»
- Find me on [LinkedIn](#)



The Set-up





Working with an Independent Asset Manger

- Independent Partner
- «Fiduciary Standard»
- Personalized Service
- Direct Access to Owners
- Continuity
- Focussed Specialization
- Choice of Custodian Bank
- Lower Minimum Size
- Broad Network of Partners

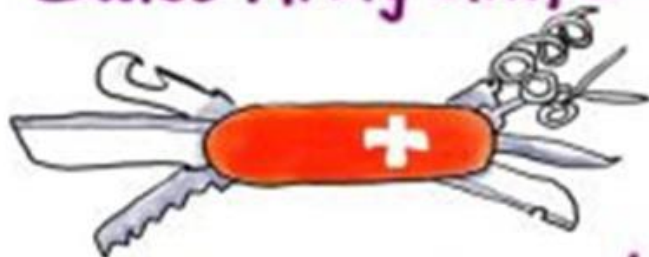




Benefits of an Offshore Bank Account

- Geographical diversification
- Different portfolio emphasis
- Added layer of asset protection
- Enhanced privacy protection
- Protection against a sinking domestic currency
- Enhanced overall Stability

Swiss Army Knife



Swiss Bank Account



Nicholson

www.nicholsoncharlton.com.au



Challenges of an Offshore Bank Account

- Costs
- Finding a competent partner
- Distance and time difference
- Paperwork


**WHAT'S THE BEST THING ABOUT LIVING
IN SWITZERLAND?**

WELL, THE FLAG IS A BIG PLUS.



Switzerland as a Jurisdiction

- Long History and track record
- Exceptional education system, professionalism, integrity
- Wealthy nation with high reserves and low debt
- Economical stability
- Political neutrality
- Strict federal laws and regulations
- Deposit protection scheme
- Swiss franc as a safe haven currency



How to choose your Asset Manager

- Trust and aligned on values and investment strategies
- Some questions to ask
 - By which authority is your organisation regulated?
 - What are your academic and professional credentials?
 - What are your fees?
 - How would you deploy my funds?
 - How frequently do you communicate with your clients?
 - How can I retrieve my investment?

Checklist: What to ask when selecting an independent asset manager



The Process

- Introduction call or video meeting
- Deciding service, bank and account type
- Providing basic information about background, finances, residency and passport copy
- Receipt of account opening set
- Bank opens account
- Account ready to be funded
- Call to talk about investment
- Ongoing communication



Our Services

Permanent Portfolio

- Min. \$ 250'000
- Mgt. Fee 1% p.a.
- Custody: Bank Winter
- Standardized mandate
- Yearly calls

Asset Management

- Min. \$ 500'000
- Mgt. Fee 1.5% p.a.
- Custody: Free to choose
- Tailor made mandate
- Quarterly calls

Concierge Level

- Min. \$ 1'000'000
- Mgt. Fee 1.5% p.a. + \$10'000 flat fee
- Custody: Free to choose
- Tailor made mandate
- Quarterly calls
- 20h of Concierge Service included

All services available for personal accounts, joint accounts, individual retirement accounts, trusts, LLCs and foundations



Partner Banks

Bank Winter 
SEIT 1892

- Founded 1892 in Vienna
- Creative and innovative solutions
- Flexibility, international, confidential
- Partner for our Permanent Portfolio

kaiser.partner
Responsibility in Wealth

- Founded in 1977 in Liechtenstein
- AuM: 4 bn CHF
- Tier 1 Core Capital Ratio 22%
- Awarded „Best Private Bank in Liechtenstein“ five times in a row

Vontobel  WIENER PRIVATBANK

- Founded 1924 in Zurich
- 21 locations
- Still family owned
- Solidarity, stability and trust
- AuM: 195.4 bn CHF
- Best Swiss Private Bank (2016)

- Founded in Vienna
- Independent & entrepreneurial
- Transparency and an extremely solid financial basis
- AuM: 2 bn EUR
- Tier 1 Capital Ratio 15.51%

WHVP
since 1991



The Investments

- Conservative, long-term oriented capital preservation strategies
- Exclusion of US market and USD investments
- Direct investments into stocks, bonds, precious metals and foreign currencies
- Stock selection: Country and currency assesment, industry attractiveness, company attractiveness, investment opportunity



Tax Considerations

- US Tax Reporting
- Withholding Tax
- Swiss Turnover Taxes
- Investment Considerations



Our Team



Jamie Vrijhof-Droese
Managing Partner



Urs Vrijhof-Droese
Managing Partner



Julia Fernandez
Managing Partner



Dr. iur. Daniel Koller
Compliance Officer



Jess Roberson
Executive Assistant



Robert Vrijhof
Founder & Advisor



SWISS MONEY SECRETS

*Robert E. Bauman JD
Jamie Vrijhof-Droese*

Free E-Book!

Send an email to jv@whvp.ch in order to receive your free copy of “Swiss Money Secrets” today.

The book covers Switzerland in terms of:

- History, politics, government and economy
- Banking industry, investing and asset managers
- Taxes, legal entities, residence and citizenship