

## Wealth Management Zürich

The liberal platform for external asset managers

Wealth Management Zurich (WMZ) is a financial services provider with a comprehensive range of services for independent asset managers (EAM). Thanks to the modular structure of Wealth Management Zurich, you can flexibly put together the service modules you need, i.e. according to your individual needs.

Wealth Management Zurich sees itself as a “one-stop-shop” for every independent asset manager who wants to or has to face the new regulatory environment.



### Uniqueness Wealth Management Zurich

The EAM can count on the fact that the principles of independence, flexibility, cost efficiency and absolute transparency apply at Wealth Management Zurich:

- You obtain individual modules from the Portfolio Management, Legal & Compliance and/or PM/CRM system.
- We focus on cost transparency, efficiency and planning security.
- You maintain your independence (no transfer of company shares, earnings).
- We relieve you of administrative work, you have more time for your customers.
- We provide you with a personal relationship manager who takes care of your concerns across all modules.

Our Services	
Legal & Compliance	Let us guide you through the FINMA approval process. You can outsource your compliance activities to us. We support you in the establishment of your company, the preparation of directives and contracts and the design of an appropriate operational organization.
Portfolio Management	In portfolio management, the WMZ team takes care of compliance and implementation of your clients' risk and investment profiles. The portfolios are set up and monitored according to FIDLEG and MiFID II standards.
Asset Management	Remain completely independent and benefit from the entire infrastructure. Join our asset management directly without major obstacles (from Q1/2022)

### Contacts

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