

# Wealth Management

## Let your wealth work for you

Want to have your wealth in the hands of an exclusive private bank? We manage your assets for you – actively and professionally.

Within the framework of our asset management mandate, our team of specialists ensures that your wealth is administered in strict adherence with the investment strategy that you have determined.

As a result, you can benefit from trends in the financial markets without having personally to deal with the constantly changing market conditions.

## Asset management – our range of services

### Detailed analysis of your overall status

- Assessing your wealth and income situation
- Determining your yield expectations and ability to bear risk
- Investment horizon
- Taking into account your needs for liquidity

## Optimizing the structure of your asset portfolio

### VP Bank Strategy Funds

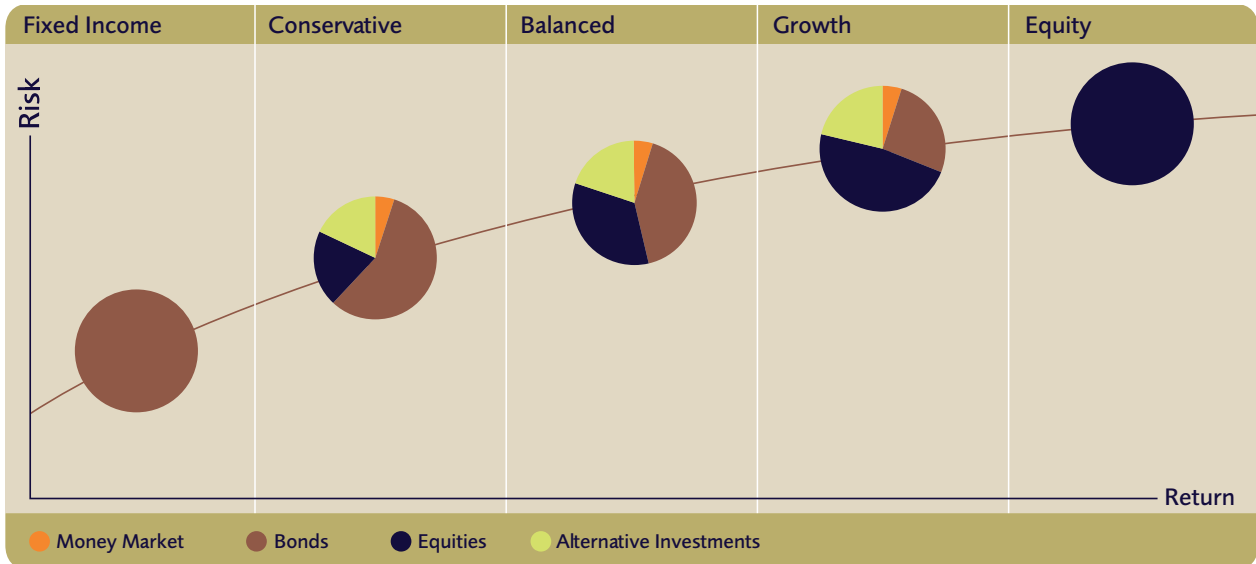
VP Bank Strategy Funds offer a complete, fully integrated asset management service.

No matter how much you wish to invest, you can benefit flexibly and cost-effectively from VP Bank's investment expertise.

Even with small investment amounts you receive the advantages of highly qualified fund management, global diversification and first-class risk management.

The implementation is based on a well-established core/satellite investment concept.

### Classic Mandates



With a Classic Mandate you can benefit directly from VP Bank's investment expertise by selecting one of the following five investment profiles: Fixed Income, Conservative, Balanced, Growth and Equity. These five profiles are offered in the reference currencies CHF, EUR and USD.

They can be implemented in one of two ways:

Blend Line: as part of the portfolio construction process, tactical decisions are implemented through direct investments and/or best-in-class collective investments.

Fund Line: pure implementation through best-in-class collective investments.

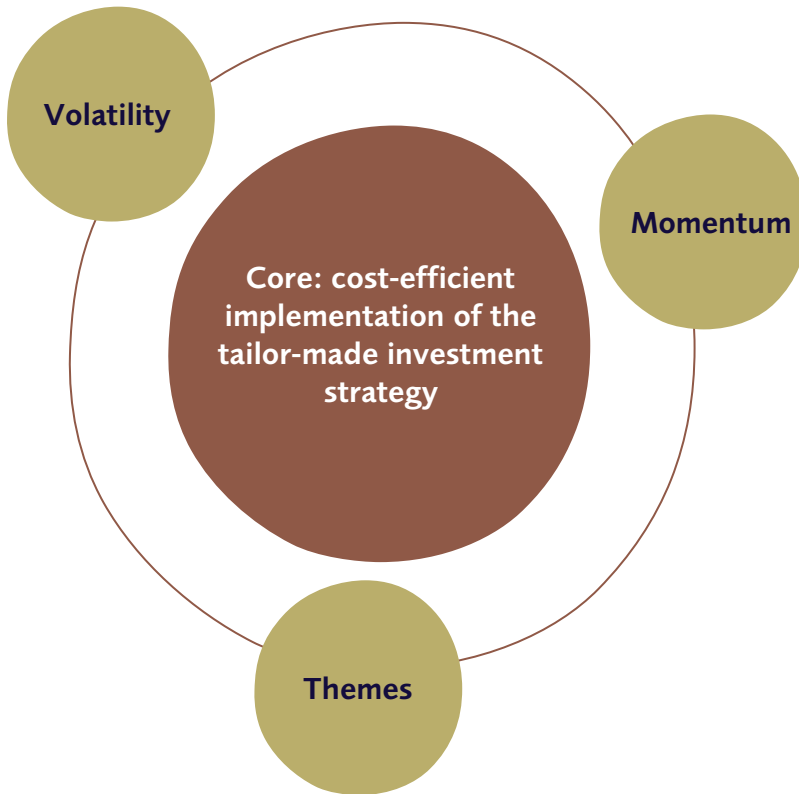
### Special Mandates

A Special Mandate allows you to have your assets managed according to an investment strategy tailored to your individual requirements.

You can stipulate investment restrictions of your own, e.g. with regard to asset classes, geographical criteria, sectors or the characteristics of particular investment vehicles.

Special Mandates can also be customized to implement specific client requirements, e.g. a desire to focus on certain regional preferences (Asia, Russia, etc.).

The tactical investment decisions of VP Bank are implemented according to your individual strategy, and reporting is geared to your specific needs.



Based on your personal risk/return expectations and your liquidity requirements, a customized and optimized investment strategy is tailored to your specifications.

This strategy is then implemented based on a well-established core/satellite investment concept.

The strategic allocation is implemented efficiently and cost-effectively by means of medium- and long-term core investments. The dynamic use of satellite strategies generates additional returns at the lowest possible risk. These might include, among others, volatility, momentum and theme-based strategies.

### Continuous surveillance

- Active monitoring of market changes and product innovations
- Regular analysis of the risk profile
- Comprehensive portfolio analyses

### Why VP Bank?

Close to 60,000 customers from more than 60 countries appreciate our expertise in the area of wealth asset management. Thanks to

our independence, you can benefit from our unbiased and worldwide experience in financial, legal and tax matters.

#### More information

[▶ Investment Views ePaper](#)

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