



**Expert Wealth Management Services
wherever you are in the world**



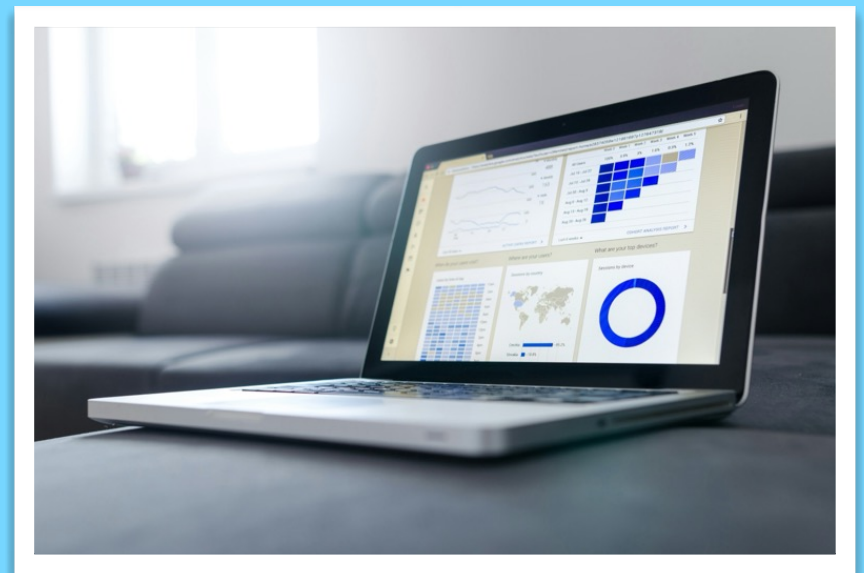
Private Wealth Advisory

Independent, digital, modern

Financial advice and wealth
management wherever you are in the
world

Your needs are unique

They deserve unique solutions



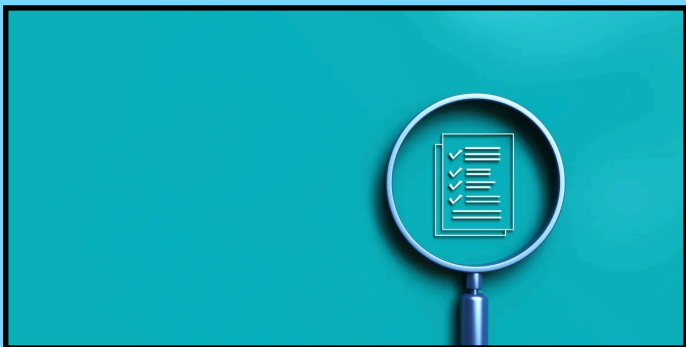


Dedicated service and advice designed with you in mind, to give you the best tools with which to achieve your financial goals

Transparent, clear, regulated

Personalised problem-solving and strategies for whatever you need, wherever you are





Transparency and patience - a full and honest assessment, having taken the time to understand your unique situation and needs, to enable me to provide structured advice and help you make the best decision possible.



Personalisation - individual needs require personal advice, not the same old off-the-shelf solutions that everyone else receives.



Experience - I have over 10 years' financial advice and wealth management experience, in addition to over 1,000 hours of FINMA- and FCA-approved study time across 10 different qualifications, all of which are all MIFID II compliance and are UK RQF Level 3 & 4, or EU (and Switzerland) RQF Level 4 & 5.

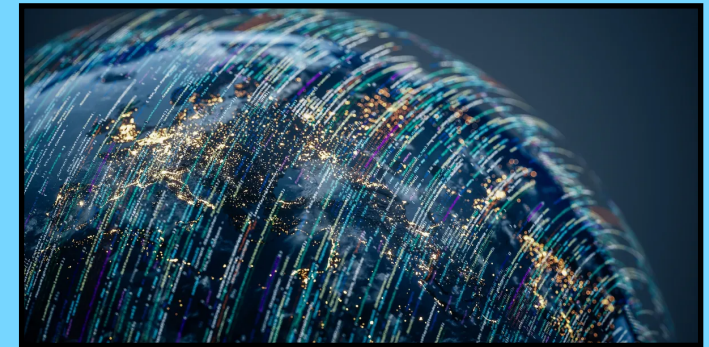


Modern and considered advice - delivered calmly and clearly via vibrant and digitalised solutions. No need for time-consuming paperwork and hassle. Interactive PDFs, digital signatures and up to date technology.

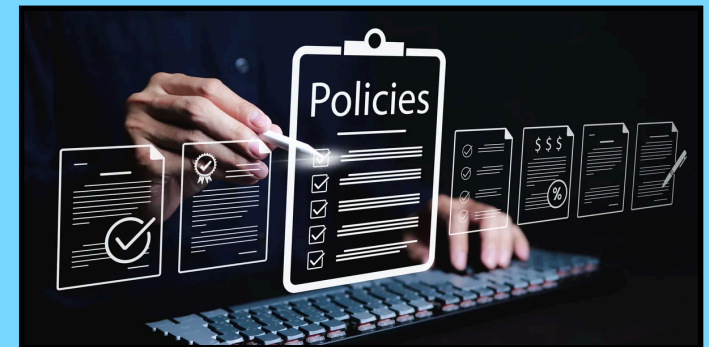
Breadth of solutions - a vast array of domestic and international solutions, including some of the world's best platforms, pensions and trustees, private banking, private markets, investment funds, discretionary fund managers, structured investments, alternative investments, property, insurance and life assurance.



Global access - financial advice and wealth management services across Switzerland, the EU, United Kingdom, USA, Middle East, South Africa and Mauritius.



Interactive Wealth Centre - your documents in one secure place, with simple onboarding and profile set up. Upload, view and access reports whenever you need them. Advanced data security for safety and confidentiality. Digital approvals: review and sign documents online with full transparency. Instantly see your assets, liabilities and net worth. Accessible anywhere, on any device.



Regulation and compliance - I am both FINMA- and FIDLEG-regulated. In addition, my qualifications are FCA-approved and MiFID II/ESMA-compliant. Beyond this, there is compliance and outstanding administrative support across numerous jurisdictions.





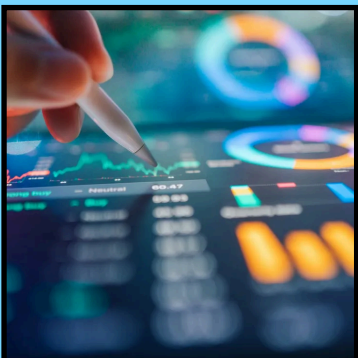
Financial planning - don't know where to begin? Let's assess what you need and when, so we can put a plan in place for your future



Pensions & retirement planning - retirement and lifestyle planning calculations and state, private and employer pension drawdown advice



International savings plans - assess a variety of savings plans, available in different currencies, for internationally mobile investors



Investments - tailored investment advice, including cashflow calculations, with quarterly updates and market commentary, via internationally portable solutions

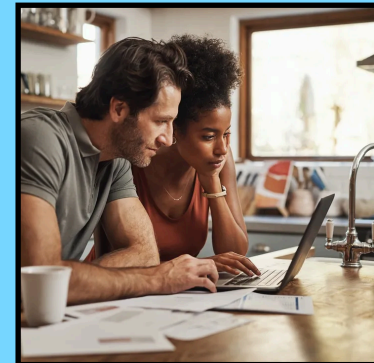
Fund management - expert fund management and portfolio services available from a diverse variety of global options



Children's education funding - detailed analysis for parents of the full costs of children's education around the world



UK pension transfers - assess your options and receive personalised advice, investment guidance and drawdown strategies



Mortgage affordability - Find out what you can afford to buy and when, with a full analysis of the associated costs





Relocation advice - full checklist and tailored guidance for internationally mobile professionals considering relocation



The Swiss Pillar 3a - assessment of the pros and cons, including a full comparison of solutions and the alternatives available



Estate Planning - Create structures and plans for managing, protecting and distributing your assets



Cost of care planning - plan for future costs of medical care when you need it most, wherever you are in the world

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