

# ONE swiss bank

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Corporate presentation

2021



# Partnering with you

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*Our aim at ONE swiss bank is to partner with you to find the most suitable and appropriate financial solutions, that are connected to your convictions and aspirations.*

*Combining your ambitions and objectives with our professional skills and adding a good dose of common sense and simplicity should build the foundation for a successful relationship.*

*Welcome at ONE swiss bank!*



**Grégoire**  
CEO and passionate about creating  
value at ONE swiss bank





# ONE + swiss + bank

## ONE

We treat every client as an individual and unique person. With needs and expectations, that cannot be copied. We strive to build tailored and sustainable solutions bringing value and meaning.

## SWISS

Being based in Switzerland, we focus on high levels of stability and security in all our relations and activities. We treat our clients trust in us with the highest attention and respect.

## BANK

By nature a Private Bank with a global reach and ambition to assist our clients in Wealth and Asset Management. Being innovative and positioned for the future of Private Banking, we are ready to follow our clients through times of change and evolving needs.

# In a nutshell

- We are a **modern private bank** offering tailored wealth management services to Swiss and international clients since 1964.
- We are a **fast growing** player combining a long tradition of wealth management with an **entrepreneurial spirit**.
- We are the result of successful mergers of companies sharing the same **values** and a **strong vision** to make a positive difference in the private banking industry.
- We are a **human sized structure** able to offer high quality, sophisticated and personalized products and services.
- We operate on a scalable operational platform with a **full banking license** and comply with all regulatory requirements.

3

offices  
(Geneva,  
Lugano, Zurich)

5

billion of  
assets under  
management\*

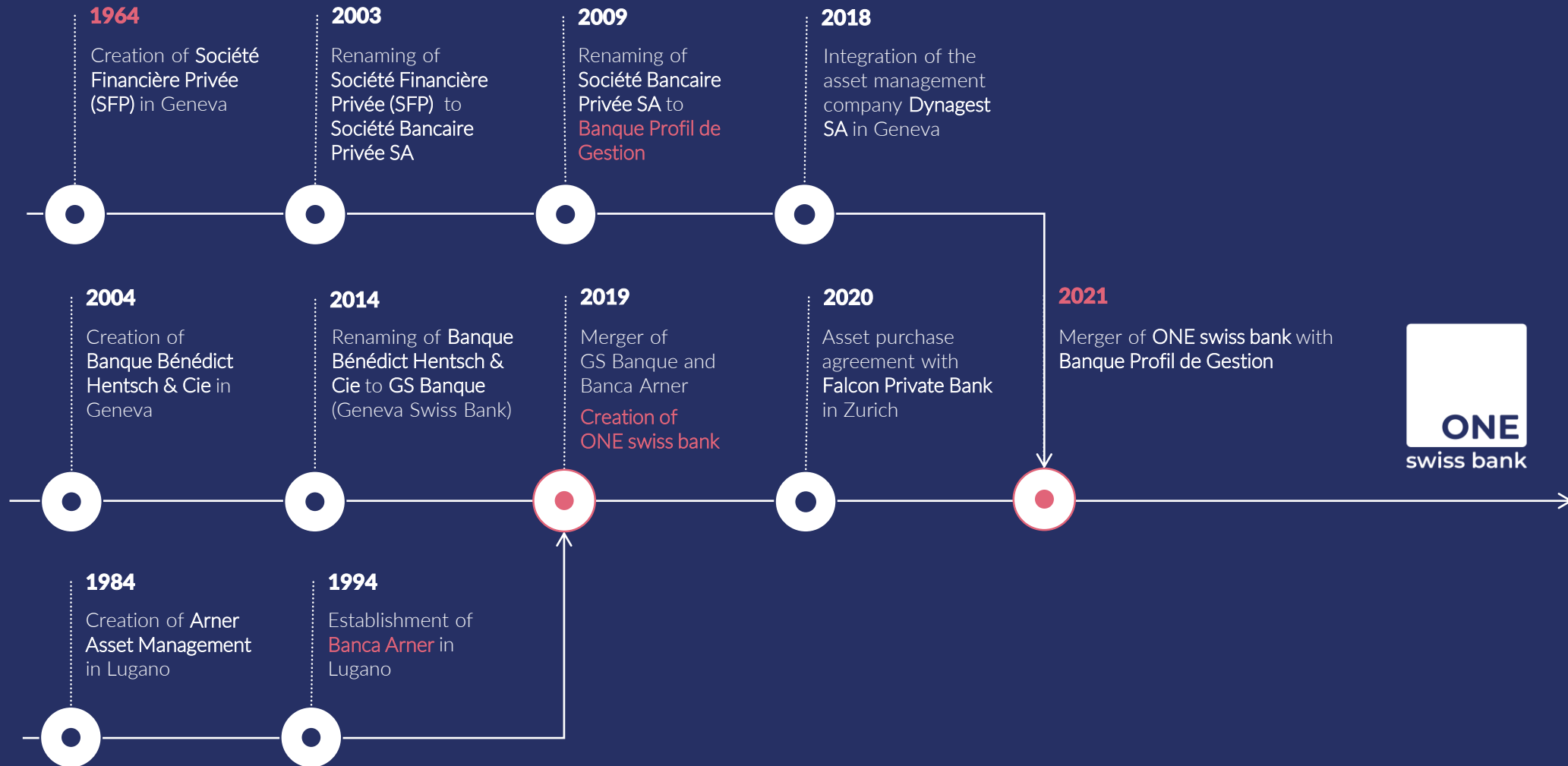
75

employees\*

*\*After completion of the integration of Banque Profil de Gestion in Q2 2021.*



# A rich history since 1964





# Our promise

## ONE for you. ONE with you.



### ON YOUR SIDE

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Fully committed and mobilized for your interests.

You have direct access to experts whose priority is to create value for you.



### SOLUTION FIRST

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Innovative solutions to match your expectations.

Based on your needs, you benefit from the most efficient solutions. Anytime.



### RESPECT & TRUST

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Transparency, rigor and integrity guide our work.

More than a client, you are a partner. Mutual respect and trust drive our relationship.



### CONNECTED

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Our human-centered way of interacting makes the difference.

As you inspire our actions, you are systematically involved in decisions.



### DRIVEN BY PASSION

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We achieve more with passion.

By sharing it, you strengthen our motivation to achieve your goals.



# Our strengths

## People

- Robust governance
- Hands-on management working towards excellency
- Dedicated and passionate investment experts
- Resilient team able to face and overcome challenges

## Expertise

- Swiss banking tradition and know-how
- Recognised expertise in delivering high quality financial services and advice
- Proven ability to manage a geographically-diversified client base
- Solid M&A track record and network

## Agility

- Entrepreneurial mindset focused on finding solutions to grow our clients' business and wealth
- Short decision-making paths
- Willingness to embrace disruptive technologies
- Constant search for efficient and appropriate solutions





Wealth management

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# Wealth management

## PRIVATE BANKING

We strive to be an easy accessible and highly qualitative financial partner for our clients. We want our clients to recommend us, as this is the best way to grow our business. All clients have direct access to a personal relationship manager, who – when needed - is empowered to take fast decisions, and – when relevant – can bring relevant experts on board.

## TAILORED SOLUTIONS

We work closely with you to fully understand your investment objectives, risk sensitivity, tax requirements and cash-flow needs. When developing your financial wealth plan, we take a holistic approach to understand your full financial aspirations. By analyzing the complete picture, our team of internal and external specialists is able to provide you with a 360° plan to help you achieve your goals.



*Giorgio,  
oenology enthusiast.*



# Your needs

Accumulating wealth is often a result of hard work, sometimes over generations, and dedicated decision making.

Therefore, you are not just looking for any Swiss private bank. Building a relationship is more valuable for you than just receiving services.

You want a boutique-sized, modern and committed financial partner. In fact, one who is as entrepreneurial as you.

You also appreciate, that your financial partner is accessible, with dedicated contact persons who act - instead of just react – in order to optimize your situation.

We believe that only a human-size wealth manager can create such a trusted relationship.





Asset management

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# Our offering

## DISCRETIONARY MANDATES

We collaborate with you to determine your appetite for return, tolerance for risk and time horizon for your investments. We check how your other assets, such as real assets, may correlate with the investments we recommend. This way of tailoring your investment strategy makes sure that your assets are invested in balance with your specific needs and you save precious time by not having to take detailed decisions yourself.

## ADVISORY SOLUTIONS

Our service for clients, who are keen on discussing their investment choices with experienced asset-management professionals before taking decisions. We analyze all available options and give our tailored advise. We work in a proactive manner and reach out, when we find good investment opportunities.



*Donna,  
passionate artist.*





# Our solutions

## **DISCRETIONARY “THEMATIC”**

- Management across several asset classes
- Dynamic allocation, as per a selected investment theme

## **DISCRETIONARY “PLUS”**

- Management across several asset classes
- Dynamic allocation, as per a selected investment profile

## **DISCRETIONARY “SPECIFIC”**

- Personalised management across all asset classes
- Dynamic allocation, as per tailored investment profile

## **“EXECUTION ONLY”**

- Orders execution
- Dedicated Relationship Manager

## **ADVISORY “EASY”**

- Access to market outlook and recommendations
- Orders execution
- Dedicated Relationship Manager as sparring partner

## **ADVISORY “TAILORMADE”**

- Personalized investment advice
- Direct line to our Asset Management team





Asset services

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# Asset services

## FINANCIAL INTERMEDIARIES

In the fast changing financial world with more and more regulations, you need a pragmatic and agile bank to support your business. We are dedicated to be this reliable and solution oriented partner for you, making it possible for you to deliver quality service to your clients. We are determined to stay updated and able to fulfill your complete needs of a strong bank for your clients.

## IMPROVING EFFICIENCY

We understand your business and support you with fast execution of orders and safe custody of your clients assets. We give you direct access to our team of professionals and support you in regulatory as well as other relevant matters. By doing this, we can reduce your workload and improve your efficiency.



# Your dedicated platform

## Your requirements

Fast standpoint & direct access to experts & decision makers

Availability, proximity & agility of your relationship management

### Relationship

A personalized relationship with access to an assigned expert of External Asset Management support

Availability of management when relevant

Flowless execution of your orders & clients operations

### Operational platform

A team devoted to the execution of your operations

and/or

Different technologies to execute orders & operations depending on the required level of sophistication

A service offering on demand from standard to value added services

### Service Offering

An account opening process with a prior notice within 48 hours

A tailor made loan/credit offering from standard to complex needs

Pricing competitiveness, & tailored on clients needs

### Pricing

Transparent & degressive pricing based on risk approach, AuM & «services on demand»

## Our commitments



One for you. One with you.

