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London, 12<sup>th</sup> April 2019

## Judges' Report

### **Toledo Capital AG: Best Wealth Management Services Switzerland 2019**

At Toledo Capital AG, investment advisors aren't seduced by short-term investment speculations. They play the long game, with stable diversification strategies for the preservation and transmission of multi-generational wealth. The boutique, multi-family firm was founded in the thriving international finance hub of Zurich to provide wealth management services for high-net-worth individuals and families, worldwide. Clients' interests and objectives set the course for the firm's investment strategies. Toledo Capital creates investment profiles for each client, with carefully calculates risk-return ratios and the ad-hoc reporting of portfolio performance. The firm allocates financial and human resources to the personalised creation of each client's monthly portfolio performance report. Its status as an independent asset manager ensures the firm is not influenced or limited by bank policies. It also enables Toledo Capital to give clients the focus and attention that they deserve. Working hand-in-hand with clients, Toledo Capital advisors use their financial prowess to cherry-pick from the investment solutions that promise an optimal balance of risk and reward for each portfolio. To achieve clients' investment goals, Toledo Capital encourages diversification across jurisdictions, classes, and currencies, to create a balanced investment portfolio mixing higher risk opportunities with others carrying low risk, and predictable returns. The CFI.co judging panel applauds the firm's client-centric and far-reaching focus, and names Toledo Capital AG as the winner of the 2019 award for Best Wealth Management Services (Switzerland).

Caroline Stone



> **Toledo Capital AG:**

# Trust – You Can't Buy It, But This Swiss Family Office Has Earned It

For all the technological innovations in the world of finance, when high net-worth individuals seek asset management and wealth planning, one factor never changes: it all comes down to trust.



And while that is the bedrock of the relationship, in today's international financial climate trust must be supported by a sturdy structure of regulation.

Uri Krausz is the CEO of Zurich-based Toledo Capital AG. Toledo provides wealth management and family office services in a “one-stop shop,” providing clients the world over with a comprehensive package of wealth management, family office services, and investment opportunities – all regulated according to the highest European standards (FINMA and AIFM).

Since the company's inception, Toledo's hand-picked team has gained respect for facilitating wealth performance and stable returns.

Behind the sophisticated and complex wealth management skills lies a brilliant but down-to-earth financier. Krausz, born and raised in Zurich, is intimately aware of the languages, culture and mentality of the Swiss banking system. He provides clients with Swiss precision, professionalism and level of service – as well as innovative solutions.

Krausz has extensive experience in the Swiss banking system, and has held high-level management positions in the UBS and Credit Suisse banks. When it became apparent that bank regulations prevented him from providing clients with certain financial services that he decided to open Toledo Capital AG in 2010.

Through this boutique, multi-family office for external financial management, he was able to provide clients with the holistic services he wasn't previously able to offer.

Swiss banking has undergone a transformation since transparency laws came into effect, obliging banks to disclose clients' information to their home countries. Switzerland continues to be the country of choice for banking and investment, thanks to the country's political and economic stability, and its banks retain the cachet of being among the most secure in the World.

No less important is the trademark customer service. Unlike the banks, Toledo invests in the most advantageous manner for the total wealth

of its clients, and with the best risk-to-return ratio.

And while banks have their own profit centres, a family office has no conflict of interest. That means that Krausz will never push specific products; he seeks the best investment, with no agenda other than to achieve the best wealth performance for each client.

Another advantage Toledo offers is consolidation of all accounts, for an overview of all investments, which allows for full and efficient diversification to reach targets.

Toledo's family office offers the added advantage of controlling hidden costs which – even in the Swiss precision banking culture – occur with annoying frequency. Toledo carefully examines all client correspondence for a complete, accurate, transparent and, most importantly, personal record of all transactions.

As a large-scale investor, Toledo procures bank fees for its custodian service that are significantly lower than average. ✱