



Independent Asset Management (EAM / FO)

Toledo Capital AG is a multi-family office established in 2010, located in the heart of Zurich. We are FINMA licensed and offer comprehensive and customized wealth management services. These include family office services for high net worth individuals and families worldwide.

- **Are you concerned about the regulatory and administrative future of your independent asset management business?**

Would you like to

- Continue to be active in an entrepreneurial and customer-oriented manner, as well as continue your activities under a solid umbrella?
- Find a solution in a dynamic and professional cooperation prepared for future challenges?
- Be supported by a strong partner in handling regulatory and administrative matters?
- Have access to a service platform that allows you to work more cost-efficiently?

We offer

- A state-of-the-art digital platform (incl. CRM tool) for modern and transparent customer care (wealth monitoring, wealth controlling)
- Know-how and administrative support by an experienced support team (incl. compliance)
- The ability to access portfolio management and full securities services
- Exclusive access to independently certified "best-in-class" asset managers
- Unique investment opportunities in real estate through our Real Estate Investment Boutique
- Expertise in wealth planning with solutions for corporations / insurance companies / trusts, as well as KYC and access to our strong network
- Access to leading technology companies through our independent innovation department
- Beautiful offices in a central location

Are you interested in a partnership or are you looking for a flexible succession solution?

Arrange an appointment with our managing director Mr. Uri Krausz.

You can reach us at +41 58 680 62 80 or by e-mail at uri.krausz@toledocapital.ch.

We guarantee full discretion.